Flex Rental Solutions - User Manual

Manual

1 — Last update: 2015/06/25

Flex Rental Solutions

Table of Contents

Introduction

Welcome to the Flex Rental Solutions User Manual. This manual will be an invaluable resource to you and your company as you implement Flex into your day-to-day operations.

The Flex User Manual is separated into five main sections:

- Getting Started
- Popular Topics
- Flex Menu Options
- Permissions Glossary
- Best Practices

For beginning Flex users, we recommend starting with the Getting Started and Popular Topics sections. For intermediate and advanced users, we recommend viewing the Flex Menu Options section, which provides information about each of the menu options found in Flex, and the Best Practices section, which includes long format videos explaining some of the best methods for setting up and utilizing your Flex system. The Permissions Glossary is also a great resource for both beginner and advanced users, in that it explains each security permission that can be granted or denied to your Flex system users.

If you are unfamiliar with Flex Rental Solutions, then we recommend viewing our 35 minute demo video:

If your questions aren't answered in this manual, please take advantage of our support offerings: Help Menu

Getting Started

In this section, you will learn how to:

- Access Your Flex System
- Navigate the Layout of Flex

Terms you should know:

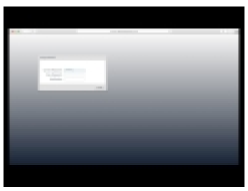
- **Resource Browser** – The left-hand section of your Flex system which contains Contacts, Facilities, Inventory, Recent Items, and Services.
- **Workbench** – The middle section of your Flex system. This is your main work area.
- **Workbench Menu** – The right-hand section of your Flex system. The menu items in this section change based on what you have open in the Workbench.
- **Main Menu** – The menu that runs along the top of your Flex system.
- **Barcode Input Box** – A manual barcode input area located at the top of your Flex system and to the right of the main menu.

Access Your Flex System

Overview

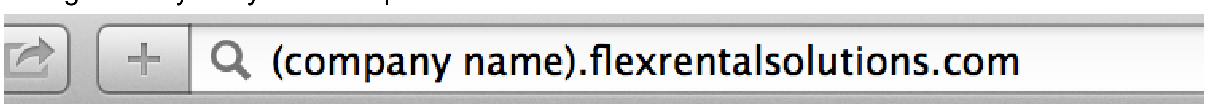
Flex is web based, which means you can access it from anywhere with a web browser and an internet connection. Flex works on Windows, Mac, and Linux operating systems and all major web browsers (Internet Explorer, Safari, Chrome, Firefox, etc.) with the Flash plugin installed.

Instructions

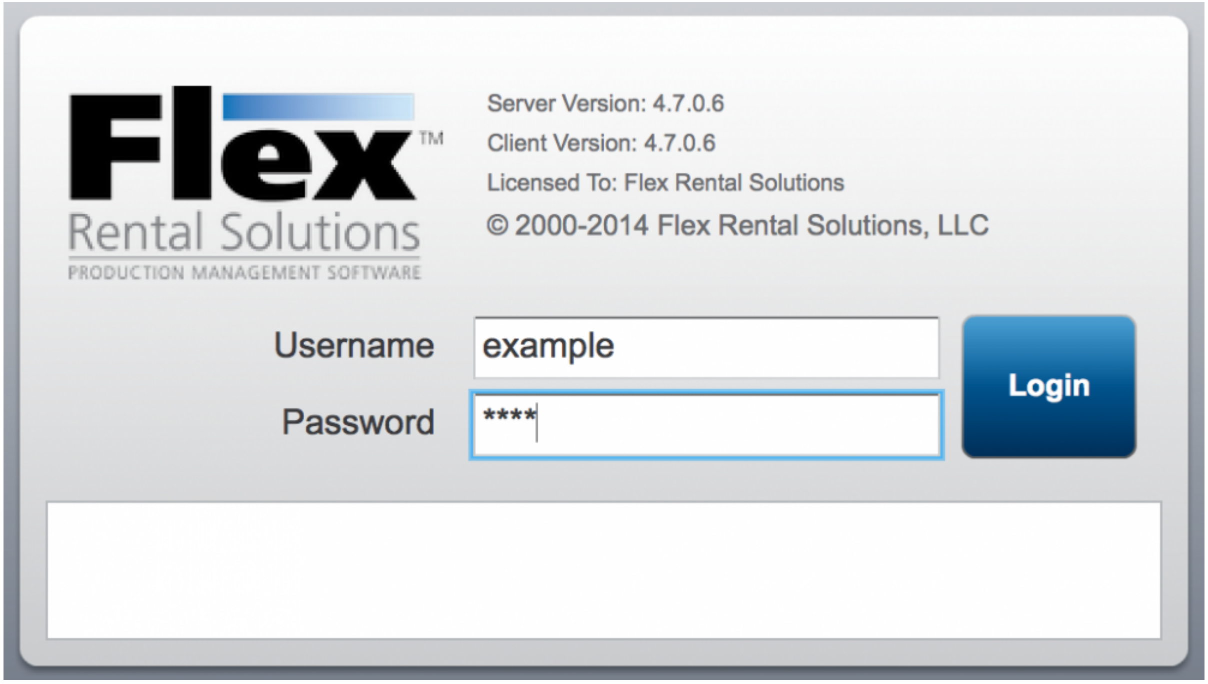


How to access your Flex system for the first time:

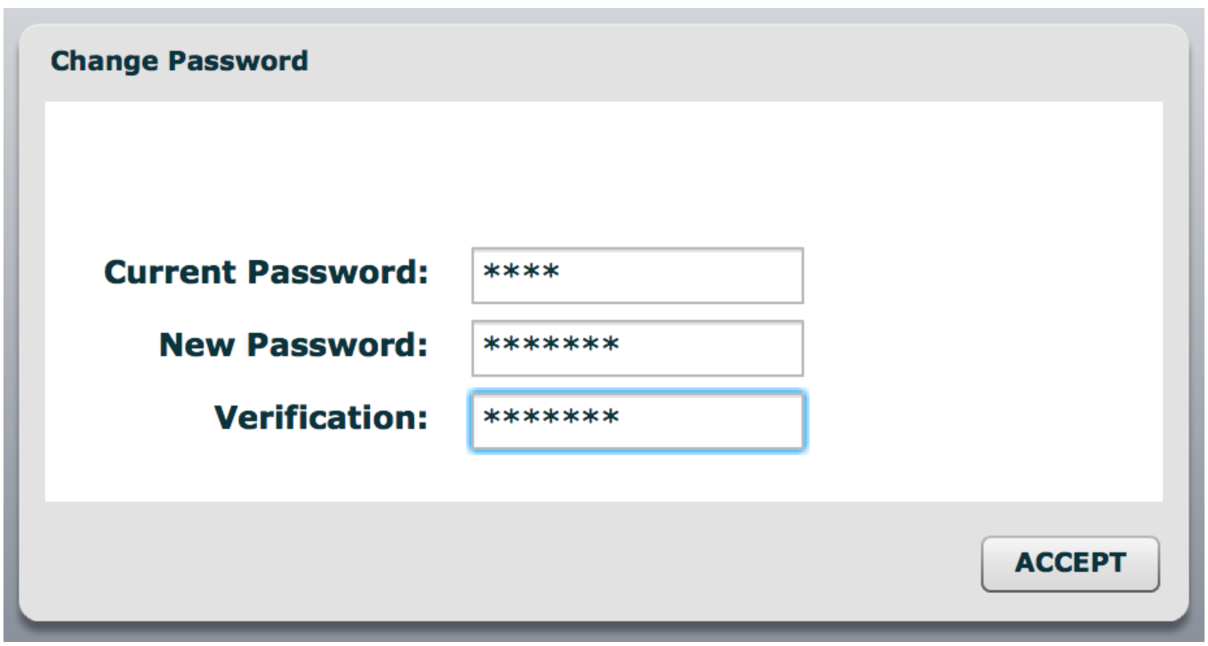
1. Enter your unique Flex web address into the address bar of your web browser. Your Flex web address was given to you by a Flex representative.



2. Enter your user name and temporary password. Click **Login** or press **Enter**.



3. Enter the temporary password in the **Current Password** field and enter your new password in the **New Password** and **Verification** fields. Click **ACCEPT** or press **Enter**.
   Note: Use your new password for all future logins.



*

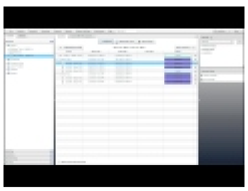
Administrators: Your user name and temporary password were provided by a Flex representative. Contact Support if you don't know your user name or temporary password.
Non-administrators: Your user name and temporary password were provided by your system administrator.

Navigate the Layout of Flex

Overview

Flex features an elegant and intuitive user interface. Learning the different parts of the Flex interface and how they interact with each other will help you to be more efficient when navigating your Flex system.

Instructions



The Resource Browser

The left-hand section of your Flex system is called the Resource Browser. The Resource Browser contains five different sections:

- **Contacts**: Includes Clients, Employees, Vendors, etc.
- **Facilities**: Shows the business locations associated with your Flex subscription.
- **Inventory**: A complete listing of all of your inventory items.
- **Recent Items**: The 25 most recently opened pages.
- **Services**: Non-inventory items that you might include on a quote, like labor, travel expenses, etc.

These sections (with the exception of Recent Items) are organized by folders and sub-folders. To navigate through folders and sub-folders, click the small arrow to the left of any folder (▶).

The Resource Browser also contains a search feature. Switch from browse mode to search mode by clicking the **SEARCH** tab at the top of the Resource Browser. You can narrow your search by selecting an option from the drop-down menu (Search All, Search Quotes, Search Inventory, etc.).

The Workbench

The middle section of Flex is called the Workbench. The calendar automatically opens in the Workbench when you log in to Flex, and any new page you open, whether it be a quote, inventory item, or system

setting, will open in a new tab in the Workbench. You can rearrange tabs by pressing and holding the mouse on a tab and dragging it to a new location. You can close a tab by clicking the small circle on the right-hand side of the tab (

), or by right-clicking on any tab and choosing either **Close All Tabs** or **Close All Other Tabs**.

The Workbench Menu

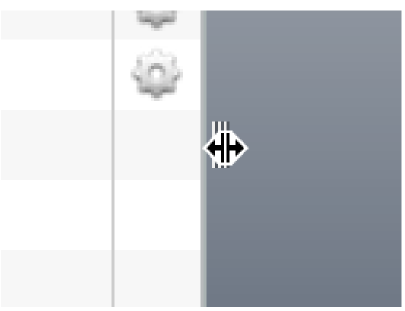
To the right of the Workbench is the Workbench Menu. The options found in the Workbench Menu change based on what you have open in the Workbench. For example, if you have a quote open in the Workbench, the Workbench Menu will list options that apply to working on a quote. If you open an inventory item in the Workbench, the Workbench Menu will list options that apply to an inventory item.

The Toolbar

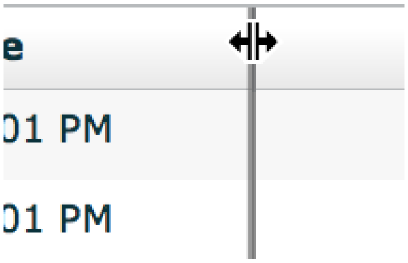
Along the top of the Flex screen is the Flex Toolbar. The Flex Toolbar contains the main menu, barcode input box, location selector, and create new element menu.

Resizing Sections and Columns

You can resize each section width in your Flex system by pressing and holding the mouse over the resize bars located between sections.  The resize cursor will appear, and you can drag the section to your desired width.



You can also resize the column width in the calendar by pressing and holding the mouse over the column separator and dragging to your desired width.



Inventory and Contacts Import

In this section, you will learn how to:

- Complete the Inventory Import Spreadsheet
- Complete the Contacts Import Spreadsheet

Terms you should know:

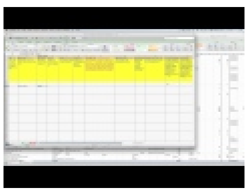
- **Non Serialized Item** – An inventory item that only has one barcode associated with it. When scanning a non serialized item in or out of your Flex system, you will be prompted to enter a quantity. Many Flex customers make their cables and other small items non serialized.
- **Serialized Item** – An inventory item that has multiple barcodes associated with it. For example, you might have ten of the same model of audio mixers in your inventory, and each of those mixers would have their own unique barcode.
- **Expendable Item** – Items that you don't expect to return into your inventory.
- **Container** – A setting that can be applied to an inventory item that turns the item into a container for other inventory items. For example, you could set an amp rack case as a container in your Flex system and scan each individual amplifier into the amp rack. When you scan a container barcode, all of the contents that have been scanned into the container will also be scanned (during the scan in and scan out process).
- **Free Pick Container** – A setting that can be applied to an inventory item that turns the item into a container during the prep/scan-out process. For example, a shipping case can be set as a free pick container in your flex system and will allow you to scan other inventory items into the container while you are prepping an order. When you scan the case on the prep screen, it will open the container.
- **Virtual Item** – A non physical inventory item. Virtual items can be placed on a quote to represent an item or package that doesn't physically exist. For example, you can create a virtual item called "Linear Foot of Pipe and Drape" which contains suggestions for the physical inventory items that make up a linear foot of pipe and drape (bases, uprights, crossbars, drape, etc.)

Complete the Inventory Import Spreadsheet

Overview

Flex offers free inventory import services. We can import your inventory directly from another rental system, or by having you fill out the Inventory Import Template. Watch the video below for instructions on how to do this.

Instructions



Complete the Contacts Import Spreadsheet

Overview

Download the Contacts Import Spreadsheet.

Popular Topics

This section contains the most requested and most searched for topics. If you can't find what you are looking for, we recommend searching through the Flex Menu Options section.

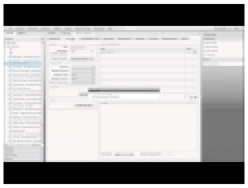
- Quotes
- Inventory
- Services
- Contacts
- Calendars
- Warehouse
- Workflow
- Reports
- Financials

System Setup

Each section in the System Setup section will help you to set up your Flex system more effectively.

Adding Flex Users
Security Groups
Security Policies
Password Policies
Sales Tax Rules
Business Locations
Corporate Identities
Currencies

Contacts



Quotes

Barcoding

Scanners

We support most usb/bluetooth/wireless keyboard wedge style scanners.

Preferred scanners allow rule configuration for “prefix” and “suffix.” If rule configured, Flex can detect a barcode scan without requiring you to move the cursor to a barcode entry field prior to scanning each barcode.

We support all standard symbologies, including Code 39, Code 128, and Interleave 2 of 5. You can even use 2D symbologies like maxicode and PDF417.

Configuration

Symbol/Motorola Scanner programming for hands free use. Print this page and scan respective rules.
DataLogic Scanner programming for hands free use. Download this page and scan respective rule(s).
If your scanner is not able to use the rule(s) above, here is a link to our forum that has many rules provided from customers.
If your barcodes scanner is different than the ones above and in the forum, you will need to program the prefix and the suffix of the scanner with the following rules.
Configure prefix: using combination of shift/6.
Configure suffix: return.

Scanner Recommendations

Scanner Recommendations:
USB-Symbol LS2208: Motorola LS2208-SR20007R-NA Barcode Scanner
USB-Motorola DS4208 2D Imager: Motorola DS4208-SBZU0100ZWR Barcode Scanner
USB/Cordless (blutooth)—Motorola LI4278: Motorola LI4278-PRBU2100AWR Barcode Scanner
USB-Honeywell Xenon 1902 2D Imager (fast & reliable): Honeywell 1902GSR-2USB-5 Barcode Scanner
Cordless-DataLogic Powerscan M8300: PM8300-AR-U-KIT for the DataLogic Powerscan M8300

Barcode Label Printer(s)

Zebra brand barcode printers that use the EPL2 programming language and are Wifi or Ethernet connected.

USB is not compatible

Barcode Printer Recommendations

WiFi: Zebra GX42-102710-000 Barcode Printer

Ethernet: Zebra GK42-102210-000 Barcode Printer

Labels

Zebra Z-Ultimate 3000T Label: Standard Size 2×1
Zebra Z-Ultimate 3000T Label: Size Options

Ribbon

Zebra 5095 Performance Resin: Zebra 05095GS06407 Thermal Transfer Ribbon

Label Templates (D)

Flex Menu Options

Flex Menu

Change Password

Dashboard

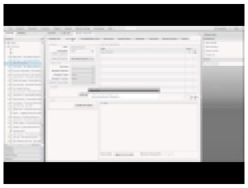
License Info

Log Out

System Status

Contacts Menu

Overview



The **Contacts** menu (in the **Toolbar** along the top of the screen) contains the following options (click on the link to go to the Flex manual page for that topic):

- Contact Manager
- Contact Relationship Types
- Contact Types
- Crew Schedule
- Crew Schedule Settings
- New Company
- New Contact
- Referral Sources
- Staff Availability Search
- To Do List

You can add a variety of different types of contacts in your Flex system. By default, your Flex system includes the following contact folders:

- Clients
- Employees
- Freelance Labor
- Labor Providers
- Vendors
- Venues

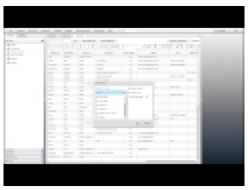
* The folders in the contacts section are called **Resource Types**. You can add custom **Resource Types** to your Flex system.

Contact Manager

Overview

The contact manager is a powerful tool that can help you search for and keep your contacts organized.

Instructions



To open the contact manager, go to the **Contacts** menu and click **Contact Manager**.

You can view all of your contacts by clicking the **ALL** button, or you can search for certain keywords like a contact or company name. You can also easily add a new contact or company by clicking **New Contact** or **New Company**.

Along the top of the **Contact Manager** is a filter. Some of the filter columns allow you to enter text to filter your search further (ex. the **First Name** and **Last Name** column), while others have a dropdown menu with check boxes (ex. any of the custom contact type groups that you created). You can clear the filter by clicking the icon.

Each column in the **Contact Manager** can be moved by clicking and dragging the column header. You can also adjust the width of each column by clicking and dragging on the edge of the column header. The column sort order (ascending or descending) can be changed by clicking on the column header. You will see the sort order arrow (on the right side of the column header) change as you do this.

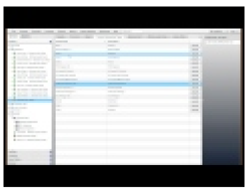
Click the **Preferences** icon to choose which columns are visible, whether or not the footer and filter are visible, and the number of records that appear per page. Click the **Save Preferences** icon to save all adjusted preferences so they will appear the same each time you open the **Contact Manager**.

Contact Relationship Types

Overview

Contact relationship types are the types of relationships that can be used when utilizing the relationships widget within a contact entry.

Instructions



On the **Contacts** menu, click **Contact Relationship Types** to view the default relationship types that you can use in your system. You can edit any existing relationship type by double-clicking on the name, or you can add a new one by clicking **New Contact Relationship Type** in the **Workbench Menu**.

Contact Types

Overview

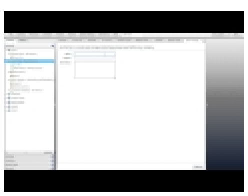
Before you begin adding contacts, take some time to add some contact types (examples: Audio Vendor, Video Production Specialist, etc.). Assigning contact types to your contacts is a great way to keep organized and can be very helpful when searching for a particular type of contact.

Note: Contact types are not the folders that you see under the Contacts section of the Resource Browser. Those are called resource types. Learn how to add new resource types for contacts.

Contact types can be organized into contact type groups. For example, the contact type “Las Vegas” can be part of the “City” contact type group, and the contact type “East Coast” can be part of the “Region” contact type group.

Company	Resource	Contact Types	Region	City
Miss America	Client	Client	West Coast	Las Vegas
Audio Sales and Rental	Vendor	Audio Vendor	Mountain	Salt Lake City

Instructions



How to create a new contact type:

1. On the **Contacts** menu, click **Contact Types**.
2. Click **New Contact Type** in the **Workbench Menu**
3. Fill in the necessary information.
    - **Name**: Examples: Audio Vendor, Video Production Specialist, Los Angeles, Staging Provider, East Coast, etc.

- **Code**: Used for internal Flex purposes in referencing this particular contact type.
- **Group**: If you haven't created any Contact Type Groups yet, the only option will be **Default**. Learn how to create new Contact Type Groups below.
- **Description**: More detailed description if needed. Example: "An audio vendor provides audio equipment… etc…"

4. Click **Create**.

Note: You can edit contact types by double-clicking on the contact type name in the **Contact Types** tab.

How to create a new contact type group:

1. On the **Contacts** menu, click **Contact Types**.
2. Click **Contact Type Groups** in the **Workbench Menu**.
3. Click **New Contact Type Group** in the **Workbench Menu**.
4. Fill in the necessary information.
    - **Name**: Examples: City, Region, Services Provided, etc.
    - **Caption**: How the contact type group name will appear in the Contact Manager. Generally the same as the **Name**.
    - **Description**: More detailed description if needed. Example: "Resource types in this group should only be the names of cities."
5. Click **Create**.

Crew Schedule

Overview

Using the **Crew Schedule** option on the **Contacts** menu is a quick and easy way to view which contacts are assigned to crew calls in your Flex system.

Instructions

How to view the crew calls that contacts in your system are assigned to:

1. On the **Contacts** menu, click **Crew Schedule**
2. Click the ⊞ (plus icon) next to any resource type to view the contacts found within.
   Note: You may have to also click the ⊞ (plus icon) on each business location that you want to view.
3. For each contact that appears, follow the row to the right to view crew calls that they are assigned to on the calendar.

You can add the previous or next month to the calendar by clicking the **Add Previous Month** or **Add Next Month** buttons found in the top left and top right corners of the **Crew Schedule** tab. The date range will always show at the top of the tab. You can also hide contacts that aren't being used on any crew calls by checking the box next to the **Hide Unused Contacts** option found at the bottom of the tab.

Double-clicking on the crew call name found in the calendar (in the row of a contact name) will open that crew call in a new tab.

Crew Schedule Settings

Overview

The **Crew Schedule Settings** will affect how the **Crew Schedule** works.

Instructions

The first option in the **Crew Schedule Settings** is which contact types will be visible in the **Crew Schedule**. Check the box next to the contact types that you want to be visible in the **Crew Schedule**, then click the **UPDATE** button in the lower right corner.

The second option is whether or not to hide unused contacts by default. If this option is set to yes, then the **Hide Unused Contacts** option found on the **Crew Schedule** will default to checked whenever you open the **Crew Schedule**. If the option is set to no, then the check box on the **Crew Schedule** will default to unchecked.

New Company

Please refer to the New Contact section for information about adding contacts and companies.

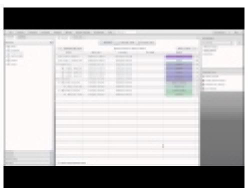
> * Using the New Company option will automatically choose “Yes” from the “Is Company” option when creating a new contact, which removes the “First Name”, “Last Name”, and “Job Title” fields. All other fields remain the same.

New Contact

Overview

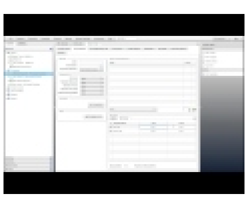
Using the **New Contact** option on the **Contacts** menu is one way that you can add a new contact into your Flex system. You can also right click on any existing contacts folder (Clients, Employees, Vendors, etc.), then choose **New Contact** or **New Company**. It is also easy to add a new contact when you are creating a new element within Flex. For example, when creating a new quote, you can click on the binoculars icon next to the client field, then click the **Add New Contact** tab. This allows you to add a new contact without exiting the new quote window.

Instructions



How to add a new contact:

1. On the **Contacts** menu, click **New Contact**.
2. Enter the new contact information.
    - **Is Company**: Choosing **Yes** will cause the **First Name**, **Last Name**, and **Job Title** fields to disappear.
    - **Resource Type**: Client, Employee, Vendor, etc.
    - **Contact Type**: Learn how to add and edit contact types and contact type groups.
3. Click **ACCEPT**.



How to edit a contact:

1. In the **Resource Browser**, browse the **Contacts** section to find the contact you want to edit.
   Note: You can also use the **Search** function in the **Resource Browser** to find contacts.
2. Double-click on the name of the contact you want to edit.
3. Navigate through the tabs found on the top of the contact info page. An explanation of each tab is found below.

Contact Info – On this tab, you can edit the basic information that you provided when creating a contact. You can also add additional addresses, phone numbers, and internet addresses. To add personal details, click **ADD FIELD** in the **Personal Details** box and select the field you want to add (e.g. birthday, anniversary, favorite restaurant, etc.)
Note: To edit existing fields in the **Telephone**, **Addresses**, **Internet**, and **Personal Details** boxes: Hover over the existing field with your pointer until a light-green shaded box appears, then click on the field and an edit box will appear.

Terms/Notes – On this tab, you can link a contact entry with a Flex system user in the **Security** box (more info), set default trading terms (**Trading Terms** box) when the contact is listed as a client on a quote, assign a default rate (**Bill Rates** box) when the contact is used as labor, and assign skills and qualifications (**Skills and Qualifications** box) with ratings.

To add more skills and qualifications:

1. On the **System Settings** menu, click **Skills and Qualifications**.
2. Click **New Skill** in the **Workbench Menu**.
3. Enter the necessary information.
4. Click **CREATE**

Referral Sources

Overview

Referral sources can be assigned when creating a new quote or other element. By default, the quote element in Flex has the option to choose a referral source in the **Edit Quote** window. Assigning a referral source to a quote or other element is a good way to keep track of where your customers are coming from. (ex. web search, existing customer referral, etc.)

Instructions

How to add new referral sources:

1. On the **Contacts** menu, click **Referral Sources**.
2. Click **New Referral Source** in the **Workbench Menu**.
3. Give the new referral source a name, code (optional), and description (optional).
4. Click **CREATE**.

The new referral source will now be an option to choose from the **Referral Source** option when creating a new quote.

Staff Availability Search

Overview

The **Staff Availability Search** is a useful tool that can help you determine whether or not a contact is available during a certain time period. You can search by contact name, skill, city, or state.

Instructions

How to search for contacts in the **Staff Availability Search**:

1. On the **Contacts** menu, click **Staff Availability Search**.
2. Enter a search query in one, several, or all of the search fields.
   Note: Entering a search query in only one field will return results for that field only. You can enter a search query in as many fields as you want and the search results will narrow accordingly.
3. Change the **From** and **To** date options to match your desired search window.

The results are separated into several columns: Name, Type (Employee, Freelance Labor, etc.), and Available (Yes or No). Double-clicking on a contact name will open their contact entry.

To Do List

Overview

The **To Do List** is a list of tasks that is unique for each Flex user. Any task assigned to a particular user will show up in their **To Do List**. Each time a user logs into Flex, their **To Do List** tab will automatically open. If the **To Do List** tab is closed, it can be reopened by clicking **To Do List** on the **Contacts** menu.

For administrators and managers, there is an option to view tasks for all users. This option is activated if a user has the permission "Can View Tasks For All Users" granted. (To learn how to change user permissions, see the section about Security Groups.) When a user has this permission granted, they will see the option to "Show for All Users" in the top right corner of the **To Do List**. Checking the box will cause the tasks for all Flex users to appear.

* For more information about assigning and completing tasks within Flex, see the section about Tasks

Financials Menu

Overview

Flex offers a powerful set of financial tools. Not only can you set up a variety of pricing models and fee matrices, but you can also integrate financial information in Flex with Quickbooks. This is a great feature for customers who already have their financial information set up in Quickbooks and want to continue using it.

The **Financials** menu (in the **Toolbar** along the top of the screen) contains the following options (click on the link to go to the Flex manual page for that topic):

- Accounting Integration
- Automation Profiles
- Credit Memos
- Fee Matrices
- Pricing Model Matrix
- Received Payments

Accounting Integration

> * We integrate with QB Desktop versions (Windows only) and QB Online versions.

QuickBooks Desktop

We integrate with the Desktop Editions using the QuickBooks Web Connector. This is a small middleman application that runs on the same machine as your QuickBooks installation. It connects to your Flex system and “pulls” down exported documents. The Web Connector is only available for Windows, so unfortunately integration is not available for the Mac QuickBooks edition.

QuickBooks Online

We integrate with QuickBooks Online with the new QuickBooks Online API. Previously we used the same underlying API as the QuickBooks Desktop but Intuit has since created a brand new API to target the Online Edition. The old legacy Online API is still in Flex as of this writing but it is scheduled for shutdown by Intuit in mid March 2014.

Currently Invoices, Credit Memos, and Received Payments can be pushed to QBO (QuickBooks Online) with support for Purchase Orders coming in the very near future.

QuickBooks Online setup

As with the Desktop Edition, QuickBooks integration has to be unlocked by the support team before it can be used. Once setup and authorized, you can begin pushing to QuickBooks Online right away.

Tax Codes

QBO (QuickBooks Online) has a global tax model which means that taxes are architected in such a way to fit most any country or area. The key concept in QBO tax is a Tax Code.

For US QBO, each line item is either taxable or non-taxable with one Tax Code assigned to the entire document.

For international QBO, each line item can be assigned a single tax code. There might be many different tax rates associated with the Tax Code but each line will only have one Tax Code.

For Flex, the equivalent of a Tax Code is a Sales Tax Rule. The sales tax rule name must exactly match a tax code in QBO. If you have tax code called “PA Sales Tax” then you must create a sales tax rule in Flex with that exact same name. In Canada, you might have a tax code called “HST ON”. You would need a tax rule in Flex with the exact same name.

The Flex tax rule matching with a tax code is crucial because we do not (and can not) modify the tax codes from our side. So, they must be created on the QBO side and matched on the Flex side with tax rules before tax can be sent over correctly.

For US QBO, we set the tax code on the Invoice and send the exact tax amount calculated in Flex. For International QBO, each line item’s tax code is set with the Flex sales tax rule name and QBO automatically calculates the tax based on the line item tax codes. Be aware, that for international QBO, the tax calculated in Flex vs QBO may be slightly different. This is due to some taxes having a more complex calculation (such as tax on tax) than Flex currently supports.

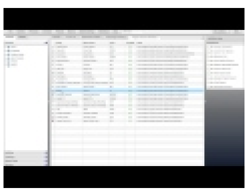
Automation Profiles

Overview

Most automation profiles are set up by Flex support and shouldn't be modified (transfer profiles, crew list automation, etc). But there are some automation profiles that you can create yourself that could be useful.

Instructions

One example of an automation profile that you can set up is recurring billing. This will allow you to set up a quote that will automatically bill an invoice at your chosen intervals. This is useful for long term rentals that are billed per week or month. See video for instructions on how to set this up:



Credit Memos

Coming soon!

Fee Matrices

Overview

Fee matrices can be used to automatically calculate different fees on your quotes. There are several different options to choose from when creating a fee matrix, including which locations the fee is applied to, which resource types the fee is applied to, and even which payment types will activate the fee matrix.

Instructions

The following playlist includes several videos explaining how to set up a variety of different fee matrices:

Pricing Model Matrix

Overview

The **Pricing Model Matrix** is a resource that allows you to quickly view which resource types are enabled for each pricing model. The **Pricing Model Matrix** only shows which resource types are enabled for each pricing model. You cannot enable or disable any resource type from this screen.

Received Payments

Coming soon!

Inventory Menu

Overview

Each inventory item in your Flex system can be set up in a variety of ways: serialized, non-serialized, virtual package, container, etc. You also have the ability to determine the amount of rental stock and retail (or expendable) stock per inventory item.

The **Inventory** menu (in the **Toolbar** along the top of the screen) contains the following options (click on the link to go to the Flex manual page for that topic):

- Catalogue Worksheet
- Cheat Sheets
- Inventory Manager
- Inventory Settings
- Maintenance Procedures
- New Inventory Item
- ROI Dashboard
- Resolve Shortages
- Scheduled Inventory Counts
- Suggestion Types

You will also learn how to Organize Inventory Groups in this section.

Organize Inventory Groups

Overview

Your inventory is organized into an inventory tree located in the resource browser. The inventory tree consists of parent inventory groups and child inventory groups. You can create new inventory groups and sort them however you want.

Instructions

Right-click on any inventory group folder and select **Inventory Group Manager**. From here, you can edit the inventory group (change name, apply icon, etc.), create a new child group under the parent group, delete the inventory group, or create an entirely new parent inventory group.

You can reorganize the order of inventory groups by dragging any inventory group folder on top of another. A pop-up box will appear asking if you want to move the group into the group you dragged it onto, above it, or below it. This works for parent inventory groups and child inventory groups.

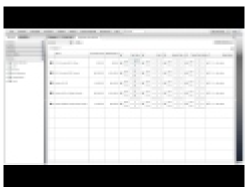
Keep in mind, the way that your inventory tree is organized is how inventory items will appear on a quote when the quote is in auto sort mode.

Catalogue Worksheet

Overview

The Catalogue Worksheet is a powerful tool that will help you in managing your inventory. In the Catalogue Worksheet, you can view and edit important information about your inventory, including item name, group membership, purchase cost, pricing, and more.

Instructions



To access the Catalogue Worksheet, go to the **Inventory** menu, then click **Catalogue Worksheet**. Along the top of the Catalogue Worksheet screen, you will find a search box, a “results per page” selector, and a “Visible Columns” menu. You can also adjust the column width of each column by clicking and dragging on the lines between the column names. You can also click and drag the column header to rearrange the order of the columns.

To edit the information found in each field of the Catalogue Worksheet, click on the text of the field and it will change into an editable field. Make the necessary changes, and all changes will be automatically saved when you click out of the field. To edit the **Group** column, double click on the name in the group field and the group selection window will appear. Highlight the new group that you want to assign the item to, then click **ACCEPT**.

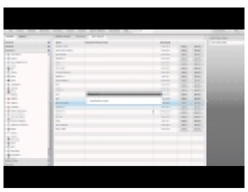
> * Experiment with adjusting column widths and selecting only the needed columns as visible to create a Catalogue Worksheet screen that is easy to navigate without the need for scrolling.

Cheat Sheets

Overview

A cheat sheet is a document that you can create that contains multiple barcodes for easy scanning access. There are many uses for cheat sheets. For example, you might want a cheat sheet for all the non-serialized video cable that you have in your warehouse. With a cheat sheet, you will have easy access to the barcodes for the video cable during the scan-out process.

Instructions



How to create a cheat sheet:

1. On the **Inventory** menu, click **Cheat Sheets**.
2. Click **New Cheat Sheet** in the **Workbench Menu**.
3. Fill in the necessary information
    - **Name**: The name the cheat sheet.
    - **Symbology**: The type of barcodes that will be used (code 128 is most common).
    - **Show Short Names If Available**: Choosing **Yes** will show the short name for the item on the cheat sheet.
    - **Number of barcodes per row**: Select how many barcodes you want to see per row.
4. Click **CREATE**.

You will be brought to the cheat sheet builder screen for the new cheat sheet. To add items to the cheat sheet, drag and drop inventory items from the inventory tree. A barcode with the item name will appear on the cheat sheet. After you have added several items to the cheat sheet, you can rearrange the order by dragging and dropping the barcodes in front of or behind each other.

You can also add a blank space to the cheat sheet by clicking **Add Blank Space** in the **Workbench Menu**. The blank space will appear at the end of the list. You can drag and drop the blank space to wherever you

want it to appear on the cheat sheet. Using blank spaces is a great way to organize your cheat sheet into separate categories.

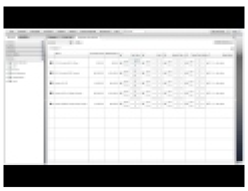
You can delete, save, or print the cheat sheet by clicking on those options in the **Workbench Menu**. You can also change any of the cheat sheet attributes (name, symbology, show short names, barcodes per row) by clicking **Edit Header** in the **Workbench Menu**.

Inventory Manager

Overview

The Inventory Manager is a powerful tool that will help you in managing your inventory. In the Inventory Manager, you can view important information about your inventory like quantity on hand, current location, container location, barcodes, and serial numbers.

Instructions



To access the Inventory Manager, go to the **Inventory** menu, then click **Inventory Manager**. The Inventory Manager features multiple search options, along with option to show or hide certain types of items. There are many tools and options to help you organize your search results. Watch the video for this section to see a demonstration of these tools and options.

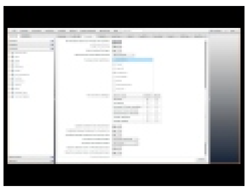
You will notice that you cannot edit the individual fields in the Inventory Manager. To edit any information pertaining to an inventory model or serialized unit, double click on the line and the inventory information screen will open. From here, you can edit the information that you need to.

Inventory Settings

Overview

There are many settings that control the look and flow of your inventory. We highly recommend not changing any settings unless you are absolutely sure what the setting does.

Instructions

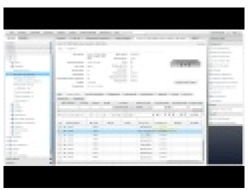


Maintenance Procedures

Overview

You can log maintenance on inventory items within Flex, keeping a record of all repairs, updates, cleanings, etc. You can also create an unlimited amount of maintenance procedures that best fit the needs of your company. A maintenance report can be created within Flex, showing the maintenance records found between specific dates.

Instructions



How to log maintenance on an inventory item:

1. Open a serial unit information page. (You can do this by scanning or entering the serial unit barcode while on the calendar page, or by choosing a serial unit from the **Serial Numbers** tab of an inventory model)
2. Click **Log Maintenance** in the **Workbench Menu**.
3. Enter the necessary information.
    - **Summary**: Enter a summary of the maintenance being performed.
    - **Procedure**: Choose a procedure to perform.
    - **Details**: Include as many details as possible.
    - **Maintenance Cost**: Enter the cost of the maintenance (if applicable).
    - **Reporter**: The person who reported the issue.
    - **Marc as OOC**: Check the box if you also want to mark the item as out of commission. This will take the item out of available inventory.
      Note: If you check the OOC box, the Out of Commission Record window will appear next.
4. Click **SAVE**.

You will now see a maintenance log entry on the **Maintenance Log** tab of the serial unit information page. If you created an OOC record along with the maintenance record, then you will see an entry on the **Out Of**

Commission tab. When the item is fixed and ready to be used again, you will click the **Resolve** button for the item on the **Out Of Commission** tab. This will put the item back into your available inventory.

Decommissioned or Sold Items

If the item could not be fixed and you will no longer be using it as part of your inventory, you can mark it as decommissioned. To do this, click **Edit Serial Number Detail** in the **Workbench Menu**, then set **Decommissioned** to **Yes**. Click **UPDATE**. You can also mark the item as sold from the **Edit Serial Number Detail** window if you sell the item.

Creating New Maintenance Procedures

You can create as many maintenance procedures as you need to. Examples: External Repair, Internal Repair, Cleaning, Fader Replacement, Screen Replacement. You can be as specific as you want with each procedure name.

How to create a new maintenance procedure:

1. On the **Inventory** menu, click **Maintenance Procedures**.
2. Click **New Maintenance Procedure** in the **Workbench Menu**.
3. Enter the necessary information.
    - **Name**: The name of the maintenance procedure.
    - **Procedure Number**: Optional number for tracking purposes.
    - **Type**: The applicable resource type. Recommended selection: **Repair** or **Maintenance**.
    - **Description**: A description of the maintenance procedure.
    - **Completion Time**: Estimated time to complete the procedure.
    - **Estimated Cost**: Estimated cost to complete the procedure.
4. Click **ADD**.

New Inventory Item

Overview

Since your inventory is a vital part of your Flex system, we recommend being as thorough as possible when adding inventory items. There are many information and tracking options that you can complete when adding inventory items (e.g. size, weight, manufacturer, purchase cost, part number, suggestions, suppliers, pricing). Taking the extra time to provide information for all these options will make tracking and maintaining your inventory much easier in the future.

There are also several different options as to the type of inventory item that you want to create (e.g. serialized, non-serialized, package, container, virtual item). Each of these options will be covered as sub-sections in this section.

Instructions

How to add a new inventory item:

1. On the **Inventory** menu, click **New Inventory Item**.
2. Fill in the new inventory item details.
    - **Item Name**: The name that will appear on quotes and other documents that are sent to customers.
    - **Item Short Name**: The name that will appear in the inventory tree.
    - **Short Hand**: Carryover from other inventory management software. Use if applicable.
    - **Track Running Hours**: Selecting **Yes** will allow you to track hours on this item whenever you scan it in and out.
    - **Primary Group**: Where the item will appear in the inventory tree.
    - **Additional Groups**: If applicable, the item can appear in more than one location in the inventory tree.
    - **Icon**: Click the binoculars icon to choose an icon from the extensive icon library. Click the broom icon to delete the current icon.
    - **Hide**: Selecting **Yes** will cause this item to be hidden from the inventory tree.
    - **Line Mute By Default**: Selecting **Yes** will cause this item to not appear as a line item on documents that are sent to customers, but will still be charged for.

- **Preset**: The Structure/Availability options will automatically change as you select a new preset. Learn more about Serialized vs. Non-Serialized Items and Containers and Packages.
- **Bar Code**: Manually enter the barcode number to be associated with this item, or leave this field blank and a barcode number will automatically be generated.
- **Notes**: Anything entered in this area will appear as a note when this item is placed into a quote or other financial document.
- **Note Mute By Default**: Selecting **Yes** will cause the note to not appear on documents that you send to customers.

3. Click ADD. The inventory item page will open.
4. Click Upload Model Image and follow the steps to upload an image for this item.

How to edit an inventory item:

1. Open an inventory item page by double-clicking on an inventory item name in the inventory tree or in the search tab.
2. Click **Edit Inventory Item** in the **Workbench Menu**.
3. Make changes and click **Update**.

Note: From the inventory information page, you can also delete the item, create a new item, copy the current inventory item, and use scheduling/processing tools.

Serialized vs. Non-Serialized Models

Overview

All of the physical inventory items that you want to track in your Flex system need to be either serialized or non-serialized models. Serialized inventory models have individual serial units, each of which have their own unique barcode. Non-serialized inventory models do not have individually barcoded units.

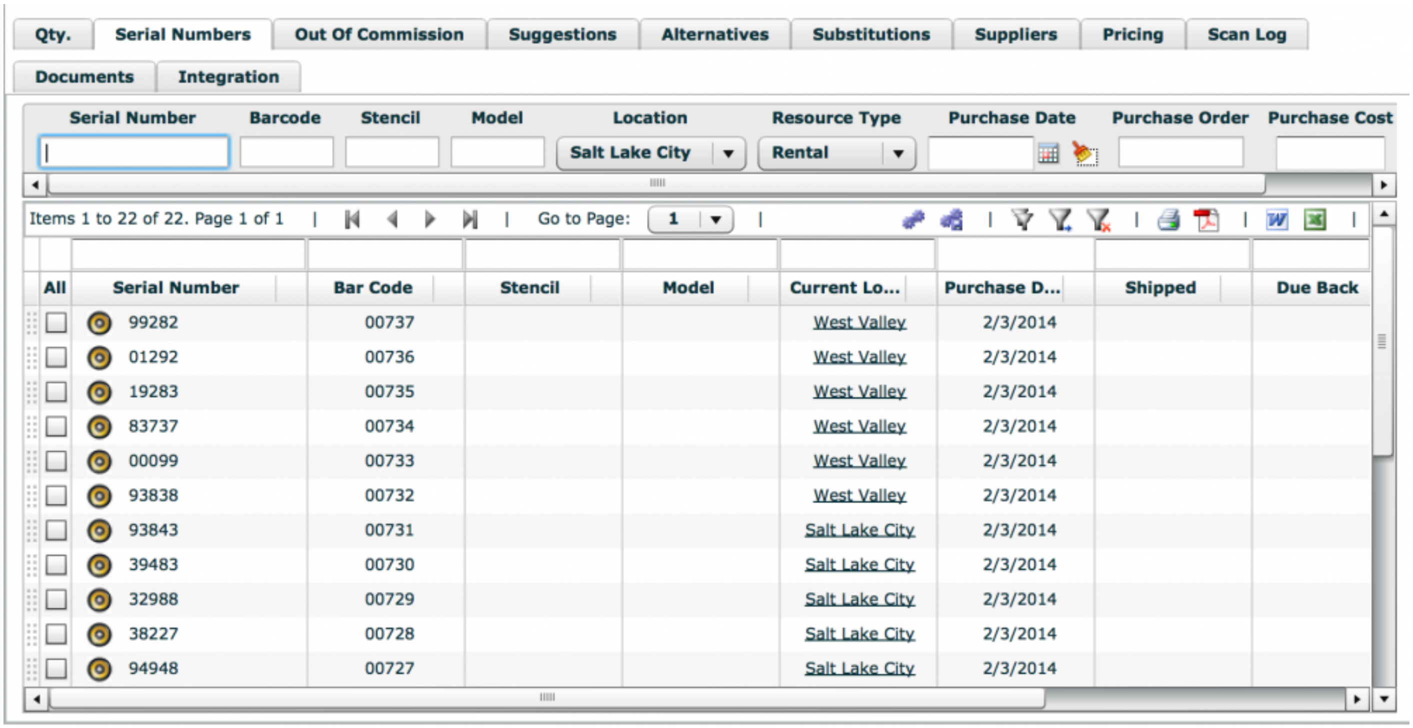
Detailed examples of both serialized and non-serialized models are shown below.

There is no right or wrong way to assign inventory models as either serialized or non-serialized. The decision of which items to make serialized models and which to make non-serialized models is entirely up to you and the way that your company operates. The guidelines presented in this lesson are only meant as examples to show how each type of item works within the Flex system.

Instructions

Serialized Inventory Model Example

A good example of a serialized inventory model is a loudspeaker. If you create a serialized inventory model in your Flex system for an EAW loudspeaker, you will find that the inventory model page has a tab called "Serial Numbers":



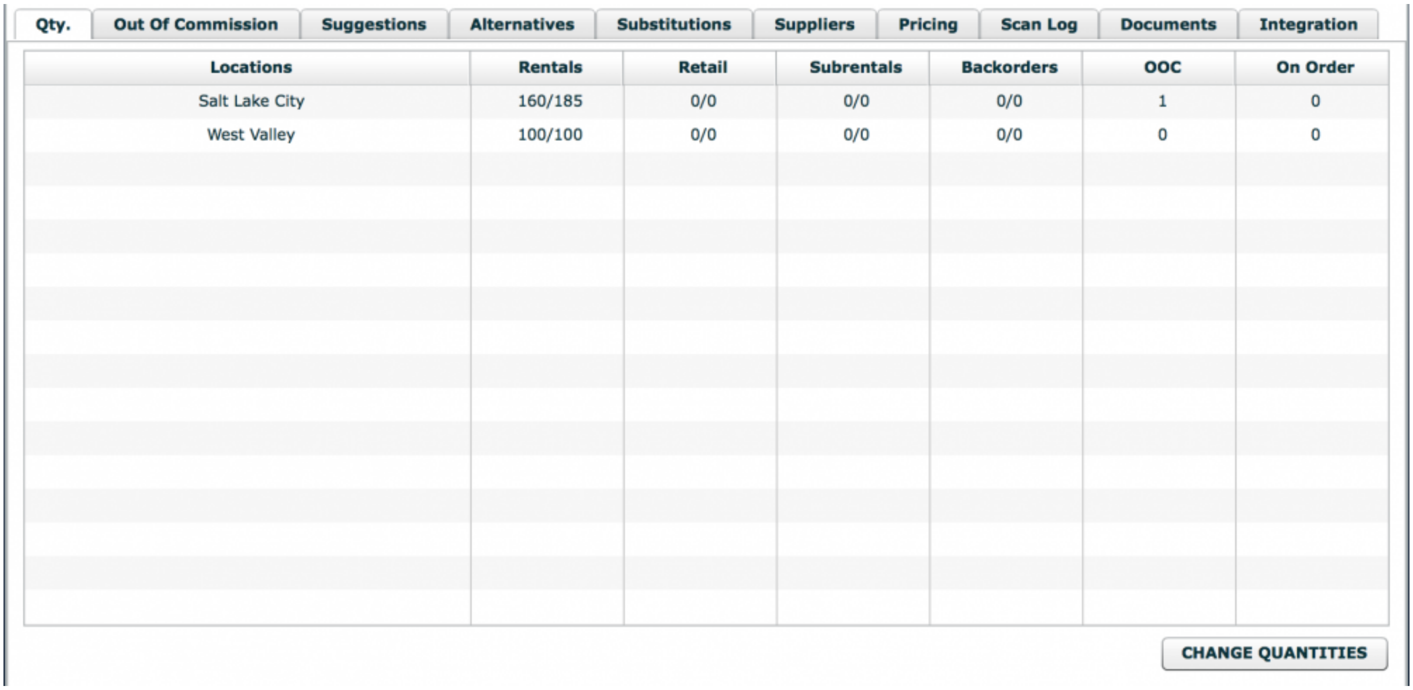
All	Serial Number	Bar Code	Stencil	Model	Current Lo...	Purchase D...	Shipped	Due Back
	99282	00737			West Valley	2/3/2014		
	01292	00736			West Valley	2/3/2014		
	19283	00735			West Valley	2/3/2014		
	83737	00734			West Valley	2/3/2014		
	00099	00733			West Valley	2/3/2014		
	93838	00732			West Valley	2/3/2014		
	93843	00731			Salt Lake City	2/3/2014		
	39483	00730			Salt Lake City	2/3/2014		
	32988	00729			Salt Lake City	2/3/2014		
	38227	00728			Salt Lake City	2/3/2014		
	94948	00727			Salt Lake City	2/3/2014		

Each EAW loudspeaker that you have in your warehouse corresponds with a serial number and will have a unique barcode. Whenever you send any of these loudspeakers out on a job, you will scan the unique barcode found on each one, thus enabling you to effectively track the location of each individual unit.

You can add a new serial number to this inventory item by entering the necessary information into the **Add New Serial Number** section. Enter any information you want to provide then click the **ADD** button. If you leave the **Barcode** field empty, a barcode will be generated automatically.

Non-Serialized Inventory Model Example

A good example of a non-serialized model is an XLR audio signal cable. If you create a non-serialized inventory model in your Flex system for a 10 foot XLR cable, you will not find a “Serial Numbers” tab on the inventory model page. There will only be one barcode created, and each cable in your inventory will be controlled by that single barcode.



Locations	Rentals	Retail	Subrentals	Backorders	OOC	On Order
Salt Lake City	160/185	0/0	0/0	0/0	1	0
West Valley	100/100	0/0	0/0	0/0	0	0

The **Qty.** tab shows the count for each location. You can change the quantity of a non-serialized model by clicking the **CHANGE QUANTITIES** button at the bottom of the screen. When you send a 10 foot XLR cable out on a job, you will type in or scan the single barcode for 10 foot XLR cables and you will be prompted to enter the quantity that you are sending to the job.

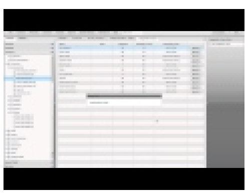
Add Suggestions and Suggestion Types

Overview

Adding suggestions to an inventory item will allow you to conveniently add related items when you place the item into a quote. For example, if place a rental iPad into a quote, you can configure Flex to automatically suggest cables and other accessories that often accompany an iPad. This makes the quote building process much easier.

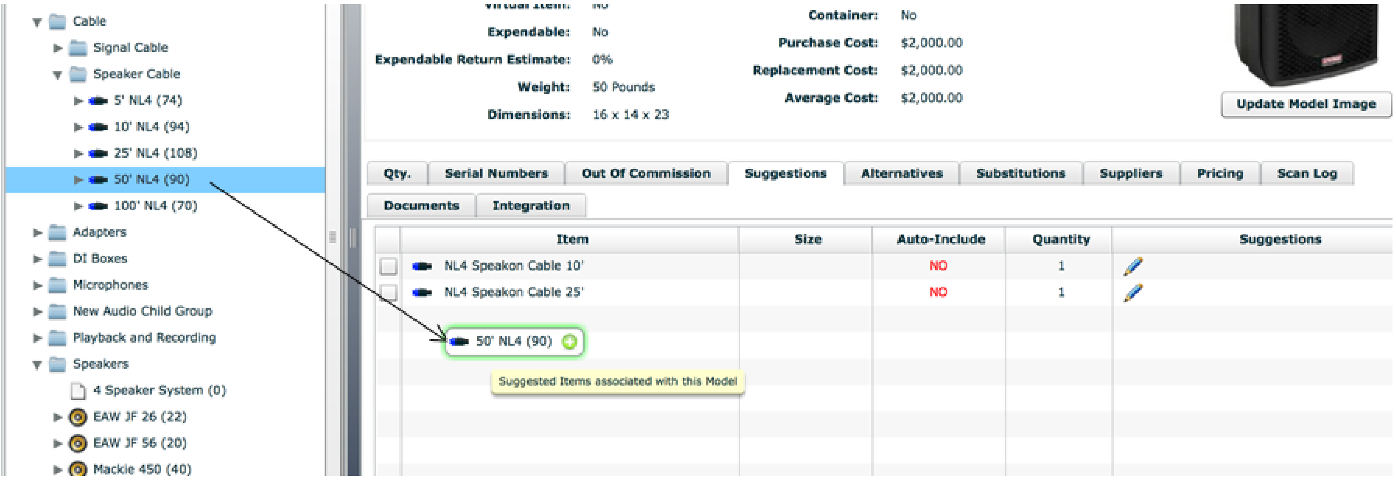
A suggestion type is a group of attributes that can be applied to a suggested item. For example, you can add a suggestion type to a suggested item that makes the suggested item either be required or not required and included or not included in the price.

Instructions

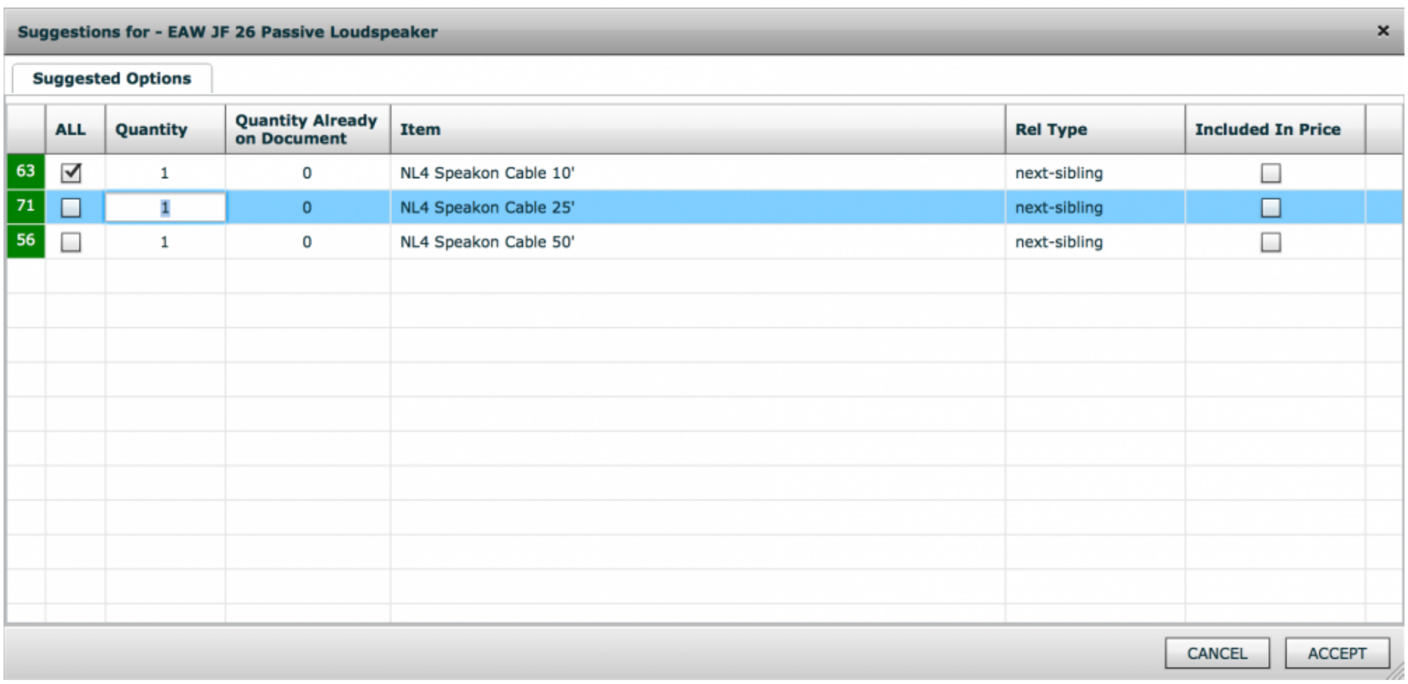


How to add suggestions to an inventory item:

1. Open the inventory item that you want to add suggestions to.
2. Click on the **Suggestions** tab on the inventory information page.
3. Drag the items that you want want to add as suggestions from the inventory tree into the suggestions area.



Now, whenever you place the item into a quote, the suggestions window will appear with the items that you added. Check the box next to the items that you want to add. The quantity will automatically calculate based on the amount of the original item that you placed on the quote, but you can also manually adjust the quantity by clicking and typing the new quantity.



You can also change the Relationship Type and Included In Price options, but these are typically controlled by assigning suggestion types.

Suggestion Types

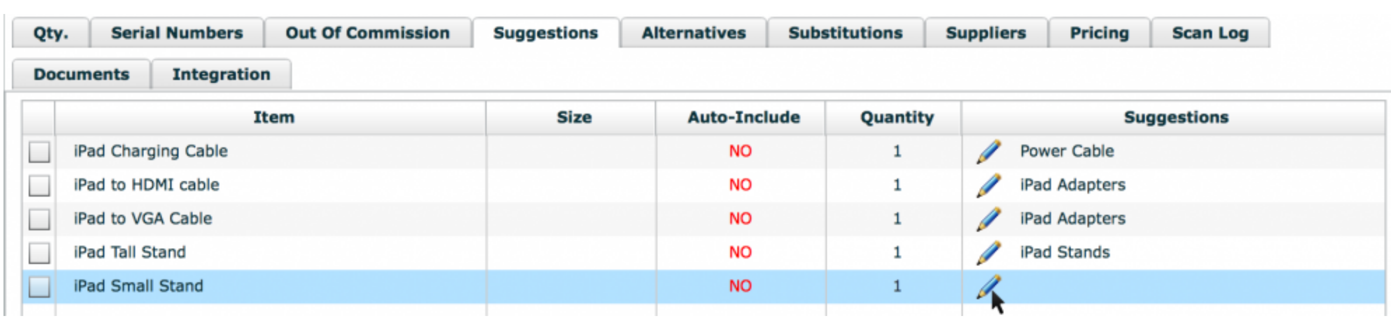
Suggestion types can be applied to each suggested item. For example, you might want a suggestion type that makes the suggested item not required, included in the price, and will be added as a child item to the main item. This suggestion type would end up looking like this on a quote:

Or you could create a suggestion type that make the suggested item required, not included in the price, and be added as the next sibling to the main item.

To create a new suggestion type:

1. On the **Inventory** menu, click **Suggestion Types**.
2. Click **New Suggestion Type** in the **Workbench Menu**.
3. Fill in the necessary information.
    - **Name**: The name of the suggestion type.
    - **Code**: Assign an optional code for tracking within your Flex system.
    - **Note**: This note will appear in the notes field when this suggestion type is added on a quote.
    - **Included In Price**: Yes or No.
    - **Association Type**: How the suggested item will appear in relation to the main item.
    - **Required**: Yes or No.
4. Click **ADD**.

Now, you can apply the suggestion type to a suggested item by clicking on the pencil icon and selecting the suggestion type.



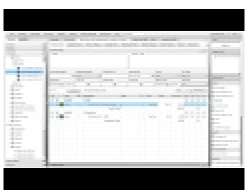
Add Alternatives and Substitutions

Overview

Adding alternatives and substitutions to an inventory item can be very useful when you need to resolve shortages. If you are short an item for a job, then you can quickly replace it with an alternative or substitution that you previously set up.

Alternatives should be viewed as a very similar replacement, like a Yamaha 12 channel mixing board as an alternative to a Mackie 12 channel mixing board. Substitutions, on the other hand, should be viewed as an upgrade, like a Mackie 16 channel mixing board substituting a Mackie 12 channel mixing board. Watch the video for more examples.

Instructions



How to add Alternatives to an inventory item:

1. Open the inventory information page for the item that you want to add alternatives to.
2. Click on the **Alternatives** tab.
3. Drag and drop other inventory items from the inventory tree that can be offered as an alternative to this item.
   Note: A relationship is created between the original item and the item that is placed in the **Alternatives** tab. If you open the inventory information page for the alternative item, you will find the original item in the **Alternatives** tab.

Now, when you have a shortage of the item on a quote, you can open the Conflicts and Availability window and replace it with the item(s) placed in the **Alternatives** tab.

How to add Substitutions to an inventory item:

1. Open the inventory information page for the item that you want to add substitutions to.

2. Click on the **Substitutions** tab.
3. Drag and drop other inventory items from the inventory tree that can be offered as a substitution to this item.

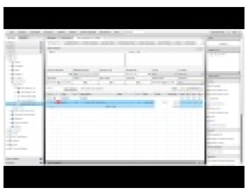
Now, when you have a shortage of the item on a quote, you can open the Conflicts and Availability window and replace it with the item(s) placed in the **Substitutions** tab.

Add Subrental and Purchase Suppliers

Overview

Adding preferred subrental and purchase suppliers to an inventory item can be very useful when you need to resolve shortages. If you are short an item for a job, you can quickly rent or purchase the item from suppliers that you previously set up.

Instructions



How to add subrental and purchase suppliers:

1. Open the inventory information page for the item that you want to add subrental and purchase suppliers to.
2. Click on the **Suppliers** tab. (You will see two sections: Purchase Supplier Preferences and Subrantal Supplier Preferences)
3. Click the **ADD** button to search for the contact entry that you want to add as a supplier.
4. Choose a contact and click **ACCEPT**.
5. Enter the Lead Time (estimated arrival) and Estimated Cost.
6. Click the **UPDATE** button to save changes.
   Note: You can repeat this process and add as many subrental or purchase suppliers as you need to.

Now, when you have a shortage of the item on a quote, you can open the Conflicts and Availability window and quickly create a rental or purchase PO with the vendor and pricing information already filled in. This is done by double-clicking on the name of the chosen vendor in the Conflicts and Availability window. (See video for an example)

Build Containers and Packages

Flex offers the ability to store inventory items within containers and packages. There are several different types of containers and packages offered within Flex, each of which work differently in the quote building and scanning out process.

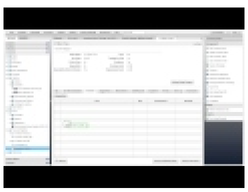
- Serialized and Non-Serialized Models with Accessories
- Serialized Packages
- Serialized Storage
- Free Pick Containers

Serialized and Non-Serialized Models with Accessories

Overview

Accessories are inventory items that always need to be sent out with a serialized or non-serialized model. For example, let’s say there is a lighting console that needs to be sent with an external power supply when it goes out on a job. The power supply doesn’t live in the case with the lighting console, but needs to be sent with it. You can add the power supply as an accessory to the lighting console, so whenever the console is placed on a quote, the power supply will automatically be added with it.

Instructions



How to set up a Serialized or Non-Serialized Model with Accessories:

1. Create a new inventory item or click **Edit Inventory Item** in the **Workbench Menu** when on the information page of an existing inventory item.
2. Under the **Structure/Availability** section, choose either **Serialized Model with Accessories** or **Non-Serialized Model with Accessories** from the **Preset** options.
3. Click **ADD** (if creating a new item) or **Update** (if editing an existing item).
   Note: Be sure to provide as much information as you can in the other fields when creating a new inventory item.

When you selected either **Serialized Model with Accessories** or **Non-Serialized Model with Accessories**, the **Model Container** option switched to yes. Now, when you are on the model (or parent) level of the inventory item information screen, you will see a **Contents** tab. This is a unique tab that only appears on the model level when **Model Container** is switched to yes.

How to add accessories to a Serialized or Non-Serialized Model with Accessories:

1. On the model level of an inventory item, click the **Contents** tab.
2. Drag and drop (from the inventory tree) the inventory item or items that you want to add as accessories into the **Contents** tab.

Now, whenever you add the model with accessories to a quote, the items in the **Contents** tab will automatically be added as child items and included in the price.

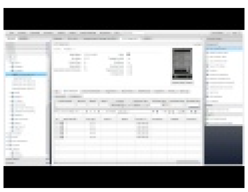
Serialized Packages

Overview

A serialized package is a physical inventory item that contains other physical inventory items within it. Scanning the serialized package barcode during the prep or return process will also scan all of the contents within it.

For example, you can set up an amp rack case as a serialized package called “Amp Rack”. Then, you can scan the barcodes of individual amplifiers into the amp rack case. Whenever you scan the barcode on the amp rack case, everything inside the case will also be scanned.

Instructions



How to create a serialized package:

1. Create a new inventory item or click **Edit Inventory Item** in the **Workbench Menu** when on the information page of an existing inventory item.
2. Under the **Structure/Availability** section, choose **Serialized Package** from the **Preset** options.
3. Click **ADD** (if creating a new item) or **Update** (if editing an existing item).
   Note: Be sure to provide as much information as you can in the other fields when creating a new inventory item.

When you selected **Serialized Package**, the **Unit Container** option switched to yes. This means that each serialized unit will have a contents tab. The contents tab on a unit level works differently than the contents tab on the model level. When you place items into the contents tab on the unit level, you are actually putting that item into the unit (e.g. amp rack case, video processing rack case, etc.). Watch the video for a visual demonstration of this.

How to add items into a serialized package:

1. Go to the inventory information page of a serialized unit.
   Note: The easiest way to do this is by clicking on the **Serial Numbers** tab of a serialized package model, then double clicking on the serialized unit that you want to view.
2. Click on the **Contents** tab.
3. Drag and drop (from the inventory tree) non-serialized items, and scan the barcodes of serialized units that you want to add to the package.
   Note: You can either scan with a barcode scanner, or manually enter barcodes in the barcode input box.

Now, whenever you scan out the barcode for the serialized unit that you just built, all of the items that you put into the **Contents** tab will be scanned out as well. This way, you don't have to open the case or package and scan all of the individual contents as you are scanning out a job.

The other settings under the **Structure/Availability** section that you should be aware of when creating a serialized package are **Contents Available** and **Contents Permanent**. The **Contents Available** setting is set to **No** for a serialized package because the items that you place into the package should not be available to rent individually. The contents should only be available as part of the package. Switching this option to **Yes** will change the preset to **Serialized Storage**, which works differently than a serialized package. Learn more.

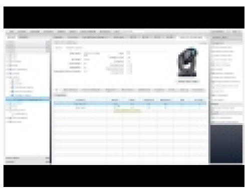
The **Contents Permanent** setting can be changed between **Yes** and **No** depending on the type of package you are building. For example, if you are building an amp rack where amplifiers are bolted into the rack and generally never move from the rack, then you would set the **Contents Permanent** to **Yes**. This will make it so the package is always intact, even through a complete scan out and scan in process.

Serialized Storage

Overview

Serialized Storage inventory items typically act as temporary storage for other inventory items. For example, a case that transports cable or lighting equipment. None of the contents of the case are permanent and can move in and out of the case in the warehouse, during prep, or on a job site.

Instructions



Free Pick Containers

Coming soon! If you have any questions, email support@flexrentalsolutions.com.

Create Virtual Items

Overview

There are two types of virtual items that you can create in Flex: Virtual Packages and Virtual Models. Each one works a little bit differently when adding them to a quote.

Instructions

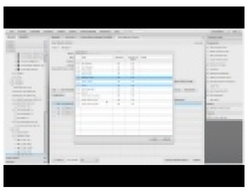
- Virtual Packages
- Virtual Models

Virtual Packages

Overview

A virtual package in Flex is not a physical inventory item, but a concept that can include contents and suggestions. The contents of a virtual package will automatically be added every time you place the virtual package on a quote. The suggestions, however, will not be automatically added, but suggested as you place the virtual package on a quote. Watch the video for an example of this.

Instructions



How to create a virtual package:

1. Create a new inventory item.
2. Under the **Structure/Availability** section, choose **Virtual Package** from the **Preset** options.
3. Click **ADD**.

Notice that you cannot manually update quantities for a virtual package. The quantity will automatically be updated based on the availability of the contents of this package.

Since the **Model Container** option was switched to yes, you can see that this virtual package has a **Contents** tab. Remember, anything you put in the **Contents** tab will automatically be added when you place the virtual package on a quote. For example, if your virtual package is called “Small Projector Package,” then you might put the following items in the **Contents** tab:

- Projector
- Projector stand
- Projector stand skirting
- Tripod screen
- 50’ VGA cable

- Source computer
  When the “Small Projector Package is added to a quote, all of those items will automatically be added.

You can also place items in the **Suggestions** tab when building a virtual package. When you place the virtual package onto a quote, the suggestions window will appear with all of the items that you placed in the **Suggestions** tab. You can choose which of the suggested items that you want to use. Examples of what you might put in the **Suggestions** tab for the “Small Projector Package” might include:

- Laser pointer
- DVI cable
- HDMI cable
- Signal converters

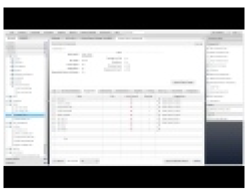
Learn more about how to Add Suggestions and Suggestion Types.

Virtual Models

Overview

Like a virtual package, a virtual model is not a physical inventory item. Many Flex customers will use a virtual model to act as a trigger mechanism for a variety of suggestions. For example, a virtual model called “Green Room Components” can contain suggestions for different types of furniture, TV monitors, drape, labor, and more. When you add the “Green Room Components” virtual model to a quote, you can virtually build a green room with the suggestions.

Instructions



How to create a virtual model:

1. Create a new inventory item.
2. Under the **Structure/Availability** section, choose **Virtual Model** from the **Preset** options.
3. Click **ADD**.

Since the **Model Container** was switched to no, you will not see a **Contents** tab. Virtual models are built entirely out of suggestions. Learn more about how to Add Suggestions and Suggestion Types.

ROI Dashboard

Coming soon!

Resolve Shortages

Overview

The **Resolve Shortages** tool is a quick way to view all shortages created by jobs in your system between a chosen date range.

Instructions

To open the **Resolve Shortages** tool, go to the **Inventory Menu** and click **Resolve Shortages**.

The **Start Date From** field will automatically fill with the current date, but the **To** date will have to be filled in manually. The maximum date range is 30 days. After choosing a **To** date, all conflicts between the the chosen dates will be shown. The following information is shown:

- Job
- Start Date
- End Date
- Resource (inventory item)
- Attempted (how many of the item is booked on the job)
- Available (the amount available during the job)

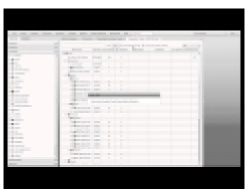
To resolve the shortage, double click on the line item and the Conflicts and Availability window will open. For more information about how to resolve conflicts see the following sections: Add Alternatives and Substitutions, Add Subrental and Purchase Suppliers, Build a Quote – Part 1

Scheduled Inventory Counts

Overview

You can perform a full inventory of all your equipment by performing a **Scheduled Inventory Count**. This involves two major processes: 1) The counting of the equipment, and 2) the reconciling of any missing equipment.

Instructions



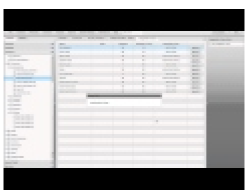
Suggestion Types

Overview

Adding suggestions to an inventory item will allow you to conveniently add related items when you place the item into a quote. For example, if place a rental iPad into a quote, you can configure Flex to automatically suggest cables and other accessories that often accompany an iPad. This makes the quote building process much easier.

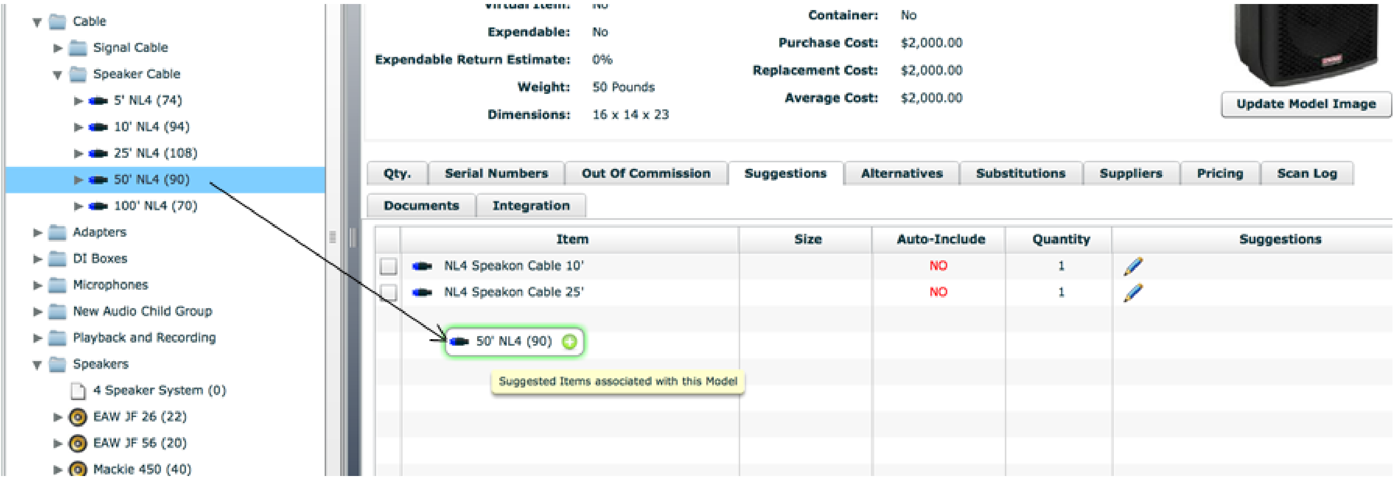
A suggestion type is a group of attributes that can be applied to a suggested item. For example, you can add a suggestion type to a suggested item that makes the suggested item either be required or not required and included or not included in the price.

Instructions

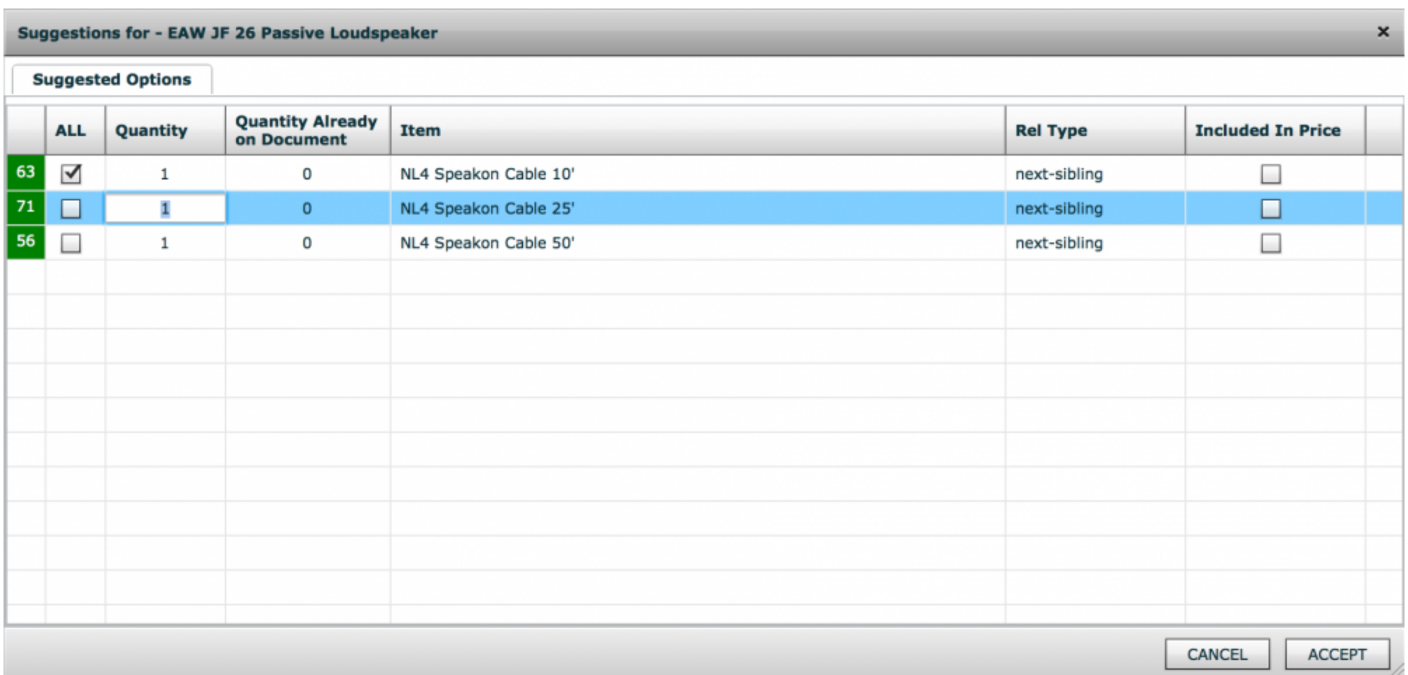


How to add suggestions to an inventory item:

1. Open the inventory item that you want to add suggestions to.
2. Click on the **Suggestions** tab on the inventory information page.
3. Drag the items that you want want to add as suggestions from the inventory tree into the suggestions area.



Now, whenever you place the item into a quote, the suggestions window will appear with the items that you added. Check the box next to the items that you want to add. The quantity will automatically calculate based on the amount of the original item that you placed on the quote, but you can also manually adjust the quantity by clicking and typing the new quantity.



You can also change the Relationship Type and Included In Price options, but these are typically controlled by assigning suggestion types.

Suggestion Types

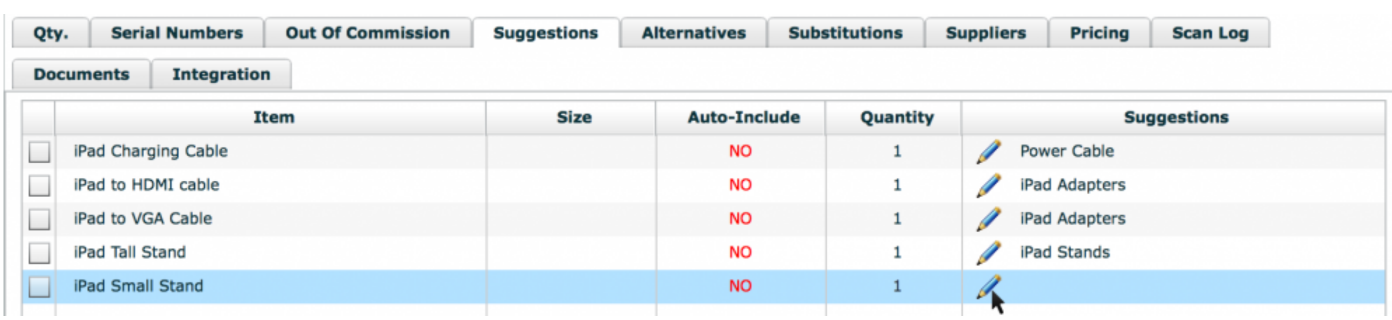
Suggestion types can be applied to each suggested item. For example, you might want a suggestion type that makes the suggested item not required, included in the price, and will be added as a child item to the main item. This suggestion type would end up looking like this on a quote:

Or you could create a suggestion type that make the suggested item required, not included in the price, and be added as the next sibling to the main item.

To create a new suggestion type:

1. On the **Inventory** menu, click **Suggestion Types**.
2. Click **New Suggestion Type** in the **Workbench Menu**.
3. Fill in the necessary information.
   - **Name**: The name of the suggestion type.
   - **Code**: Assign an optional code for tracking within your Flex system.
   - **Note**: This note will appear in the notes field when this suggestion type is added on a quote.
   - **Included In Price**: Yes or No.
   - **Association Type**: How the suggested item will appear in relation to the main item.
   - **Required**: Yes or No.
4. Click **ADD**.

Now, you can apply the suggestion type to a suggested item by clicking on the pencil icon and selecting the suggestion type.

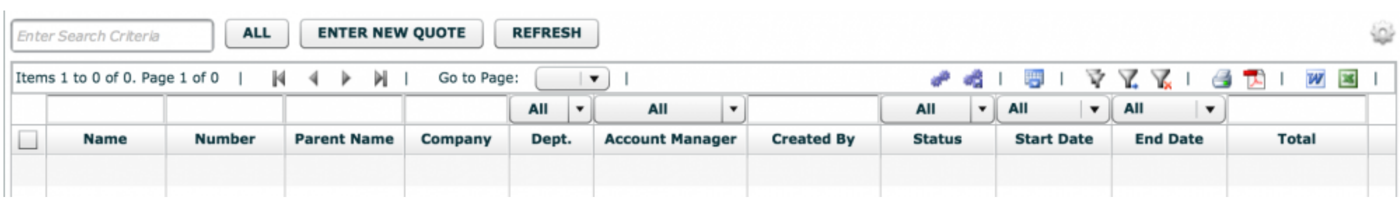


Projects Menu

Overview

The **Projects** menu contains some very important settings and information pertaining to the project elements found within Flex (quotes, invoices, POs, etc). The **Project Elements** menu option contains all of the settings for each of your project elements, and the **Workflow** menu option contains all of the workflow settings and paths that are used within the project elements.

Clicking on one of the project element menu options (like **Quotes**, **Invoices**, **Crew Calls**, etc.) will open a list of all of those elements that are found within your system. These lists are very customizable, with options to change which columns are visible, sort order, sort priority, and more. There is also a very useful filter function that will help you to narrow your search.



In addition to these important project element menu options, the **Projects** menu also contains quick link options for each of the calendars that are set up in your system.

> * The **Projects** menu itself is very customizable. You have the ability to add or delete project element names from the menu, as well as additional calendars.

Calendar

Overview

By default, the main calendar in Flex is called “Calendar”. This calendar automatically opens when you log into Flex. If you happen to close the calendar tab, clicking the menu option **Calendar** on the **Projects** menu will open it again.

The **Calendar** option on the **Projects** menu reflects the name of the default calendar in your system. If you change the name of the calendar, then that name will appear in the **Projects** menu.

Instructions

Calendar Templates

Overview

The **Calendar Templates** selection on the **Projects** menu shows a list of all the calendar templates that you have created in your system. The list will show the important information about each calendar template, including whether or not it is a default calendar, a personal calendar, which contact is associated with the calendar, and what the default view is.

Double-clicking on any template from the list will open that calendar in a new tab. Clicking the X on the far right side of the row of any calendar template will delete that calendar.

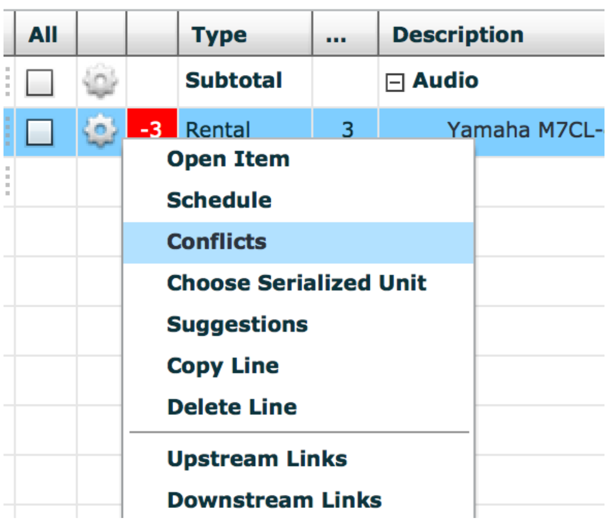
Conflict Resolvers

Overview

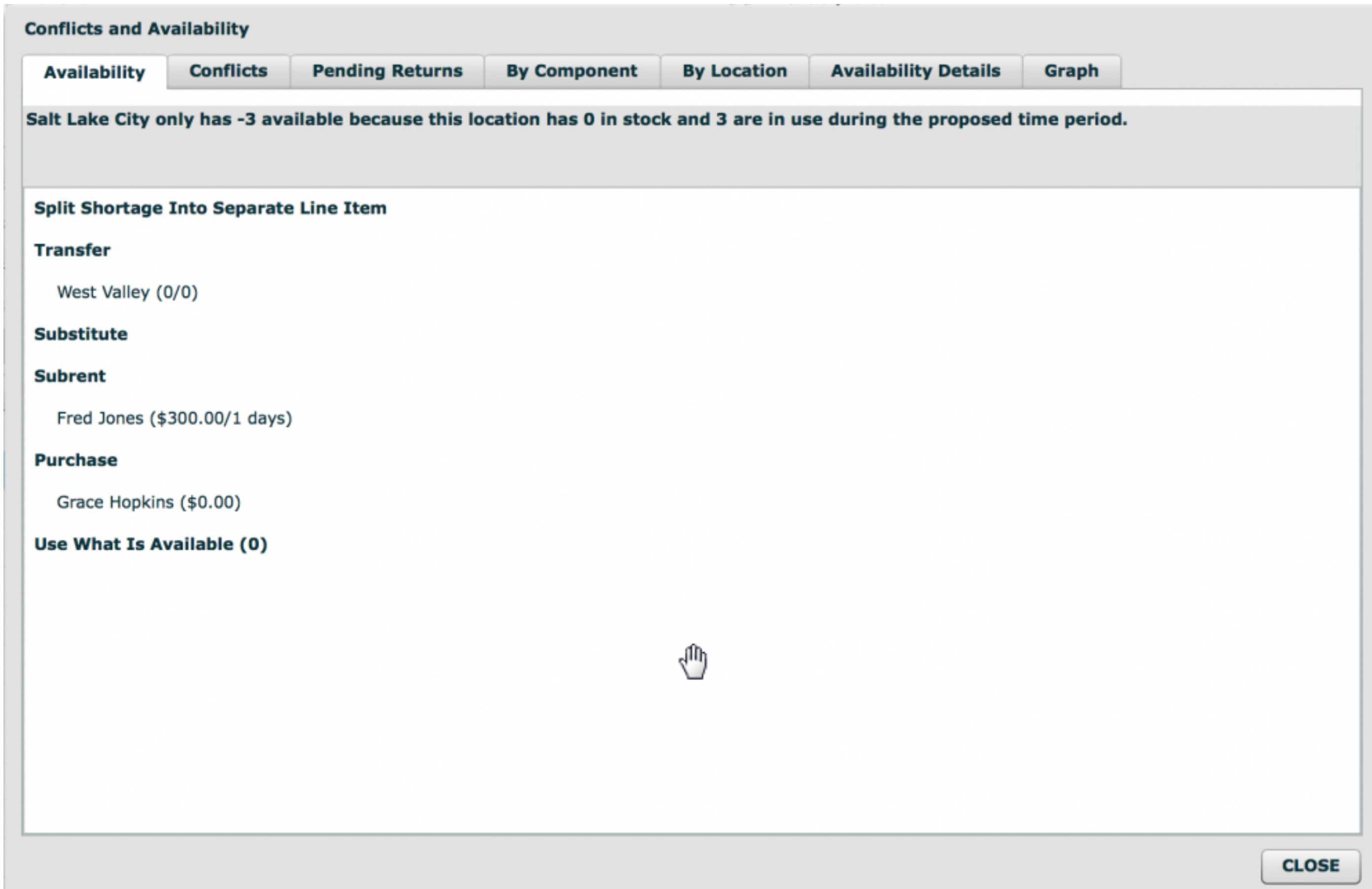
The **Conflict Resolvers** selection on the **Projects** menu is a list of the different ways that you can resolve conflicts in your Flex system. By checking or unchecking the box on each row, you can enable or disable that conflict resolution option in your system.

Instructions

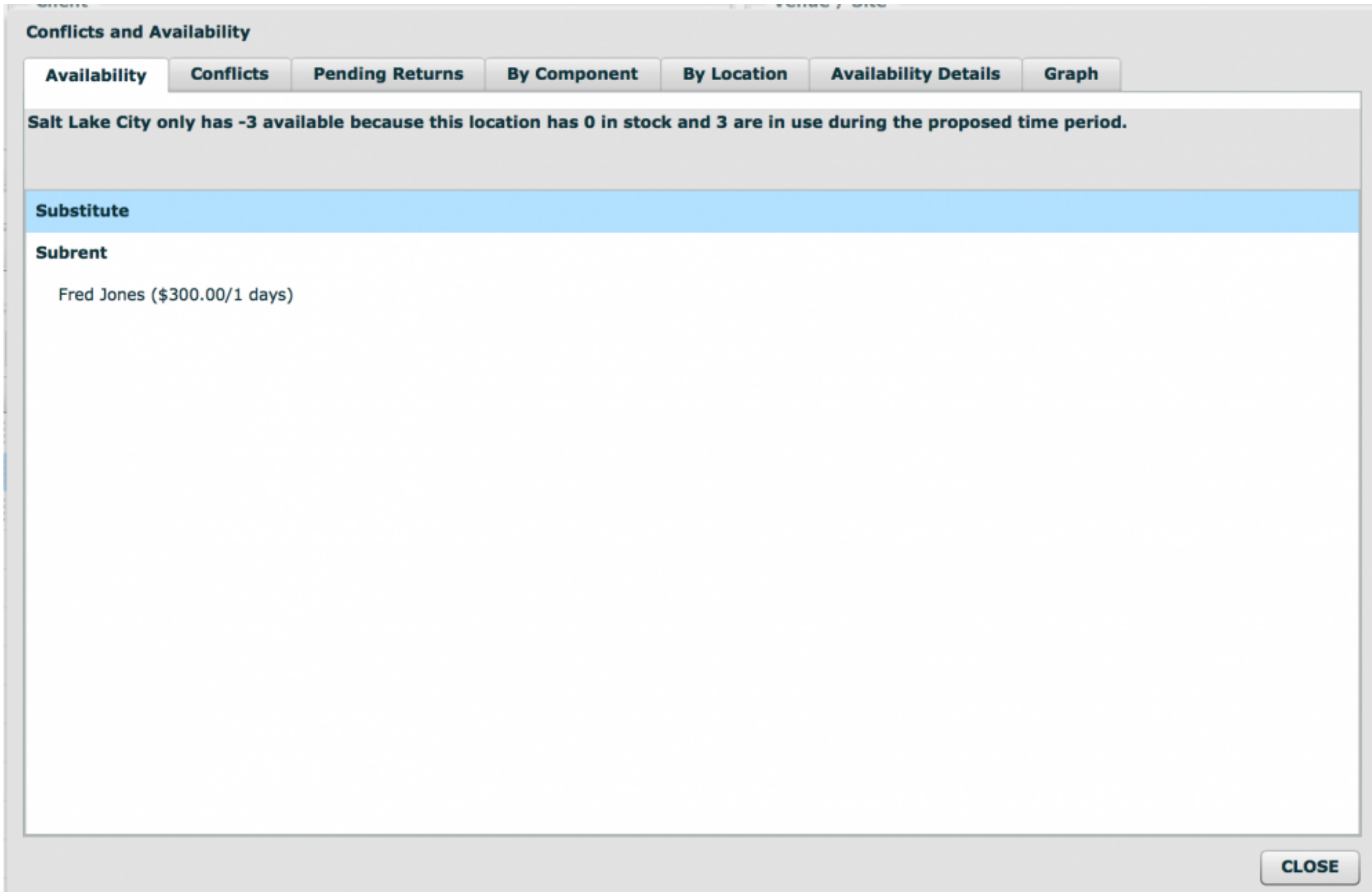
The conflict resolution options are the options that appear in the **Conflicts and Availability** window when you have an availability conflict while building a quote or other financial document. The **Conflicts and Availability** window is accessed by clicking on the cogwheel of a line item that has an availability conflict, as seen here:



With the **Conflicts and Availability** window open, you will see the options that are enabled in the **Conflict Resolvers** page. For example, if all the options in the **Conflict Resolvers** page are enabled, then the **Conflicts and Availability** window might look something like this:



As another example, let's say that only the Subrent and Substitution options are checked as enabled in the **Conflict Resolvers** page. In this case, the **Conflicts and Availability** window for the same inventory item might look something like this:

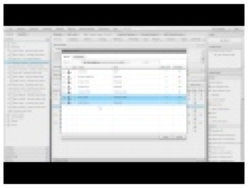

Conflicts and Availability
Availability
Conflicts
Pending Returns
By Component
By Location
Availability Details
Graph
Salt Lake City only has -3 available because this location has 0 in stock and 3 are in use during the proposed time period.
Substitute
Subrent
Fred Jones ($300.00/1 days)
CLOSE

Consolidated Copy Profiles

Overview

Consolidated Copy Profiles is currently not an active feature in Flex. A future update will activate this feature, along with related functionality.

Crew Calls



E-Mail Templates

Overview

The **E-Mail Templates** selection on the **Projects** menu contains the e-mail templates that are used when sending communication to clients through Flex. By default, the following e-mail templates are found in your Flex system:

- Credit Memo
- Email PDF to Vendor Template
- Send Invoice to Client
- Send to Client Template (used when sending a quote to a client)

Instructions

How to edit an existing e-mail template:

1. On the **Projects** menu, click **E-Mail Templates**.
2. Double-click on the e-mail template that you want to edit
3. Edit each field as needed.
4. Click **UPDATE**

Project Elements

Overview

The Project Elements settings are where you can modify each element in your system (quotes, invoices, pull sheets, etc). After clicking on an element from the project elements page, you will see a variety of tabs that contain all the settings for that element. These tabs include the following:

- Numbering Tab
- Reports Tab
- Custom Fields Tab
- Accounting Options Tab
- Document Views Tab

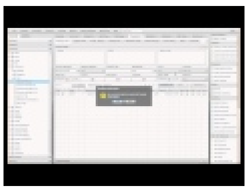
After making changes on any tab, be sure that you click the **UPDATE** button on the bottom right to save changes.

Numbering Tab

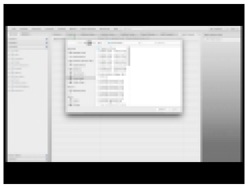
Overview

The **Numbering** tab of the project element settings is where you can control the numbering scheme of the element.

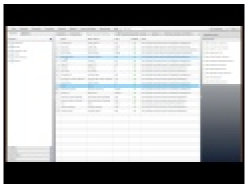
Instructions



Reports Tab



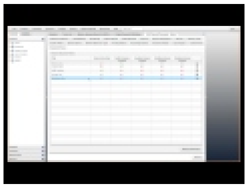
Custom Fields Tab



Accounting Options Tab

Coming soon…

Document Views Tab

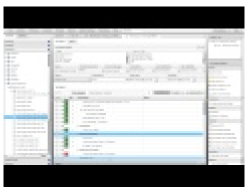


Pullsheets

Overview

Once a quote is completed and in the confirmed status, you can create a pull sheet. The pull sheet will include all of the gear from the quote that needs to be sent to the job or event. Creating a pull sheet is the first step in the scanning out process.

Instructions



How to create a pull sheet:

1. Ensure that the quote is in Confirmed status.
2. Click **Create / Update Pull Sheet** in the **Workbench Menu**.
3. Review the email template, then click **OK**.
   Note: This is the default workflow action that occurs when creating a pull sheet. The workflow is customizable.

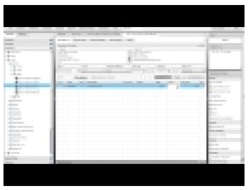
The pull sheet has many of the same options as the quote. You can add or delete items, and generate a variety of reports. There are also a few new options that you can use on a pull sheet, including:

- **Add Virtual Group** – Much like adding a new subtotal in a quote. This will create a group into which you can place inventory items.
- **Sort Line Items** – Gives you the option to sort the items on the pull sheet in a variety of ways.
- **Go To Prep Screen** – Will launch the prep screen, where you can scan gear out of availability in preparation for shipping to a job or event.

Purchase PO

Overview

Instructions

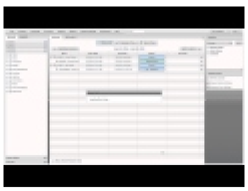


Quotes

Overview

The quote element is one of the most used elements in Flex. Because of this, we have made it very easy to quickly create a quote.

Instructions



How to create a new quote:

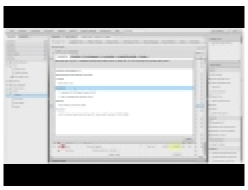
1. Click the **New** drop-down menu (on the top right-hand side of the screen).
2. On the **New** menu, click **New Quote**.
3. Enter the necessary information in the **Edit Quote** dialogue box.
   Note: Technically, the only required fields in the **Edit Quote** dialogue box are the **Name**, **Ship Date** and **Return Date**, but we recommend completing as many of the fields as you can.
4. Click **ACCEPT**

Build a Quote – Part 1

Overview

Part 1 covers adding items to a quote, the different sort modes, and the "mute" check boxes which are found on each line item of a quote.

Instructions



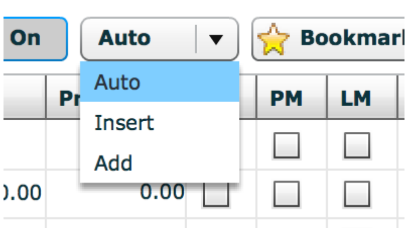
Adding Inventory Items to a Quote

To add an item to a quote, click and drag the item from the inventory tree. Wait for the box to turn green, then drop the item. Enter a quantity, then click **ACCEPT**. After an item has been added to the quote, you can edit most of the information for the item, including quantity, notes, rental time and rate, and pricing. Click in each field to edit. The field will either turn into a text editable field or a drop down menu. Make the changes, then click out of the field and the changes will be saved.

You can also add items to a quote from the search function in the resource browser. Search for an inventory item, then drag and drop it into the quote.

Sort Modes

There are three different sort modes when building a quote: **Auto**, **Insert**, and **Add**. You can select which sort mode to use from the menu at the bottom of the quote header.



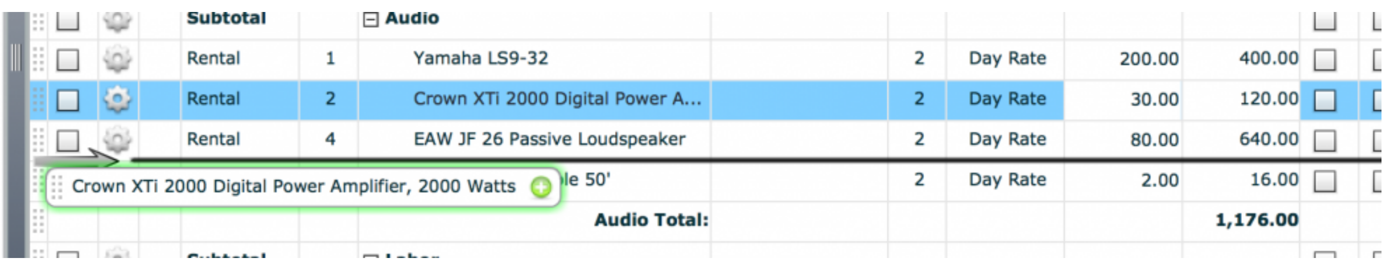
Auto sort mode: When you drag and drop an item into the quote in **Auto** sort mode, it will automatically sort into a subtotal. Furthermore, each item will be sorted in the quote in the same order that the items are sorted in the inventory tree. Remember, you can sort folders and inventory items in the inventory tree any way you want. The folders and items at the top of the inventory tree will appear first on a quote when you are in **Auto** sort mode.

Insert sort mode: When you drag and drop an item into the quote in **Insert** sort mode, you can place the item wherever you want on the quote. This includes into any existing subtotal, or outside of a subtotal. A thick black line designates where the item will be dropped into the quote.

Add sort mode: When you drag and drop an item into the quote in **Add** sort mode, the item will automatically be sorted to the very bottom of the quote.

Notice that when you are in **Insert** or **Add** mode, a few new icons appear, including **Add Note Line**, **Add Misc Line**, and **Add Blank Line** to the quote.

You can move any line item on a quote by clicking and dragging on the far left-hand side of the line (the small dots). A thick black line will indicate where the line item will be dropped.



Adding Services to a Quote

Adding services to a quote works the same as adding inventory items to a quote. Drag and drop any service offering into the quote and it will be added.

The Cog Wheel

Each line item on the quote has a cog wheel with some helpful tools. Click on the cog wheel to see the following options:

- **Open Item** – Will open the inventory information screen for the item.
- **Schedule** – Will open the detailed schedule for the item.

- **Conflicts** – Will open the conflicts and availability window, allowing you to resolve conflicts and availability issues.
- **Choose Serialized Unit** – Allows you to choose a specific serialized unit to be sent for the line item.
- **Suggestions** – Will open the suggestions window, allowing you to choose any suggestions that have been applied to the item.
- **Copy Line** – Will copy the line. After a line has been copied, clicking on another cog wheel will show the paste option.
- **Delete Line** – Delete the line item from the quote.

You can also view the upstream and downstream links for the item, and add note, misc, or blank lines to the quote.

The “Mute” Check Boxes

Each line item has several check boxes on the right-hand side. These check boxes are used to “mute” certain parts of the line item. By default, there are four check boxes found on each line item: Note Mute (NM), Price Mute (PM), Line Mute (LM), and Total Mute ™.

Checking the Note Mute (NM) box will make the notes on this line item not appear on the PDF copy of the quote. This is useful when you have notes that you only want to be seen internally and not by the customer.

Checking the Price Mute (PM) box will make the price of the line item not appear on the PDF copy of the quote, but the price will still be added to the total price of the quote.

Checking the Line Mute (LM) box will make the line item not appear on the PDF copy of the quote. This is useful when you have items that are meant to be part of a package and you don’t necessarily need the customer to see those items.

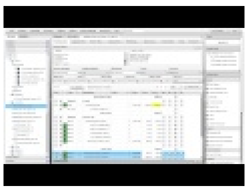
Checking the Total Mute ™ box will make the line item not be included in the total price, but the price of the item will still be shown as a reference.

Build a Quote – Part 2

Overview

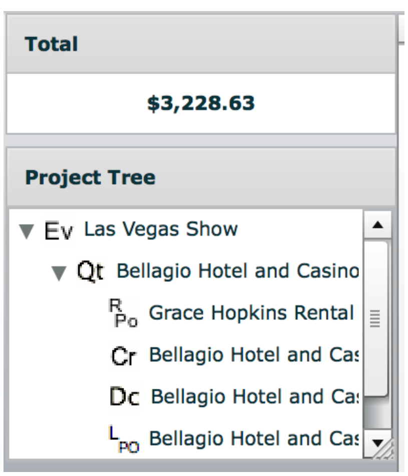
Part 2 covers the tools and options found in the **Workbench Menu** for the quote.

Instructions



The **Workbench Menu** for the quote has many useful tools and options, along with some important information about the quote.

At the top of the **Workbench Menu**, you will see the total amount due for the quote, and the project tree. The project tree will show you all of the parent and child elements that are associated with this quote. For example, a parent Event Folder, a child Rental PO, a Pull Sheet, or a Crew List that is associated with the quote.



You can double click on any of the parent or child elements to open them.

Under the total and project tree, you will find the **Quote Menu** options. The **Quote Menu** options are split into several different categories. The first category is **Modify**, which includes the following options:

- **Edit Header** – Will open the edit window that was opened when you created the quote.
- **Copy Selected Lines** – Will allow you to copy multiple selected lines.
- **Delete Selected Lines** – Will allow you to delete multiple selected lines.
- **Bulk Edit** – Will allow you do edit multiple line items at once.
- **Create Subtotal** – Will allow you to create a custom subtotal in which items can be placed.
- **Reset Price** – Will allow you to reset the default price of line items that have been manually changed. (Select a line item or multiple line items, then choose the **Reset Price** option)
- **Apply Trading Terms** – Will apply new trading terms that have been applied to the client of the quote.
- **Copy** – Will allow you to copy the entire quote, with the option to copy the whole project tree, change dates, and reset workflow.
- **Move** – Will allow you to move the quote into a parent folder.
- **Delete This Quote** – Will allow you to delete the entire quote.

The next category is **Reports**, where you can generate a variety of PDF copies of the quote. By default, only a few reports are available in the category. You will learn how to enable more reports in the next lesson, Send a Quote to a Client >>. Related to the category is the **Send To Client** category, which will send a PDF copy to the client. This is also covered in the next lesson.

The **Logistics** category gives you options to update associated child elements when you make changes on the quote. The **Financials** category gives you options to manage the financial aspects of the quote. The **Display** category allows you to refresh the entire quote, or just refresh the availability of the quote.

The **Workflow** category will show all of the workflow options that are associated with the current status of the quote. For example, when the quote is in Inquiry status, the **Workflow** category might show options for confirming the quote, canceling the quote, or making the quote tentative. When the quote is in Confirmed status, the workflow options will change to reflect the new options associated with a confirmed quote (ex. create a pull sheet, create an invoice, and more).

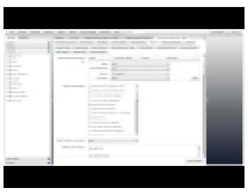
The **Add Child Elements** category allows you to quickly add new child elements to the quote, like a crew call, documents, a PO, and more.

Send a Quote to a Client

Overview

There are several ways to send a quote to a client, including Flex's built in functionality to send the PDF copy via email, and creating a PDF copy to print and give to the client. You also have the option to customize the appearance of the PDF copy.

Instructions



Note: After recent updates to Flex, the **Save Changes** button seen in the video is now called **Update**.

Send To Client Option

The fastest way to send a quote to a client is by clicking **Send To Client** in the **Workbench Menu**. This will open a window with an email template and email addresses automatically filled in. You can either edit the template from this window, or edit the template itself so your changes will appear every time.

To edit the "Send to Client" email template:

1. On the **Projects Menu**, click **Email Templates**.
2. Double-click **Send to Client Template**.
3. Edit each field as desired.
    - **Name**: The name of the template.
    - **From Address**: Who is sending the email. Inputting "USER" will automatically enter the user's email address each time the template is used.
    - **CC Addresses**: Add carbon copy addresses.
    - **BCC Addresses**: Add blind carbon copy addresses.
    - **Subject**: The subject line of the email.
    - **Template Text**: The body of the email.
4. Click **UPDATE** after you have made changes.

Notice that there are many substitution tokens (code between brackets) in the body of the email template. If you want to change the substitution tokens in the email template, we recommend emailing [Support](#) for help.

Reports

The **Workbench Menu** for the quote contains a variety of reports that you can generate and send to the client. By default, there are only a few reports enabled in your Flex system, but you can enable many more.

How to enable reports for a quote:

1. On the **Projects** menu, click **Project Elements**.
2. Double-click **Quote**.
3. Go to the **Reports** tab.
4. In the **Instance Level Reports** list, check which reports you want to be available.
5. Click **UPDATE**.

Now, if you go back to the quote, you will see the reports that you checked listed under the **Reports** category in the **Workbench Menu**.

Default Print Format Report

You can build a report that is made of up several reports. For example, many Flex customers like to send a quote with a summary page and a terms and conditions page. Instead of manually creating each of those reports then piecing them together, you can create them all at the same time and as the same report.

How to modify the default print format report:

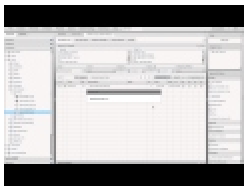
1. On the **Projects** menu, click **Project Elements**.
2. Double-click **Quote**.
3. Go to the **Reports** tab.
4. In the **Default Print Format Report** section, choose a report, corporate identity (optional), location (optional), and sub-report (optional).
5. Click **ADD**.
6. Repeat for as many reports that you want to add to the default print format report.
7. Click **UPDATE**.

There is a demonstration of this in the video at the 2:35 mark.

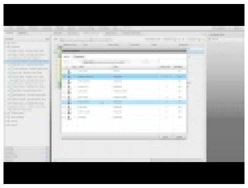
Rental PO

Overview

Instructions



Staffing Assistant



Tasks

Coming soon!

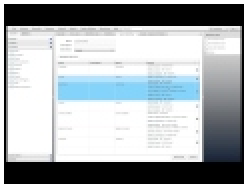
Workflow

Overview

Each element in Flex has a workflow that allows you to move through the different statuses of that element (e.g. Inquiry, Tentative, Confirmed, etc). Each workflow **State** is tied to a status, and a workflow **Action** is how you can move from one state to another. Each workflow **Action** can have workflow **Jobs** associated with it (e.g. sending an email template, creating a pull sheet, etc).

Instructions

Workflow Jobs



Reports Menu

Contact Export

Overview

Use the **Contact Export** option to create a .CSV file that contains the information for all of your contacts. This includes name, contact type, phone numbers, address, and more.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	
1	CONTACT_T\	CONTACT_TY	CONTACT_T\	CONTACT_T\	CONTACT_T\	CONTACT_T\	SALUTATION	FIRST_NAME	M_I	LAST_NAME	TITLE	IS_COMPAN'	CONTACT_G	CONTACT_R	EMPLOYER_I	COMPANY_N	ADDRESS	ADDRESS2	ADDRESS3	CITY
2	Venue											Y				Abravanel H:	123 West, South Temple			Salt
3	Vendor											Y				Audio Sales a	223 North Street			Salt
4	Vendor											Y				AV Pros	223 North Street			Salt
5	Venue											Y				Bellagio Hote	3600 S. Las Vegas Blvd			Las
6	Vendor											Y				Flex Rental Solutions				
7	Vendor											Y				Insane Audio	4828 Backend Way			Salt
8	Client											Y				Jones Corp	2382 Southb	Suite 234		Port
9	Vendor											Y				Lighting Supp	748 Lighting Way			Ligh
10	Venue											Y				Madison Squ	4 Pennsylvania Plaza			New
11	Client											Y				Miss America	55 Miss America Way			Las
12	Venue											Y				Noah's West	322 W 11000 S			Wes
13	Client											Y				Novell	Something Something Street			Prov
14	Vendor											Y				Poll Sound	223			Salt
15	Client											Y				RosenCo	234 Atotcha Road			Box
16	Venue											Y				Salt Palace C	100 South West Temple			Salt
17	Vendor											Y				Smith Stagin	235 Robbin Birch Way			Las
18	Client											Y				Stevens and	Stevens Way			Salt
19	Employee											Y				Ultimate Auc	55 N State St	Suite 230		Salt
20	Employee							Josh		Anderson	Account Exe	N				Ultimate Auc	55 N State St	Suite 230		Salt
21	Employee							Barry		Carlton	Shop Tech	N				Ultimate Auc	55 N State St	Suite 230		Salt
22	Employee							Jeremy		Clyde	Sales	N				Ultimate Auc	55 N State St	Suite 230		Salt
23	Freelance Labor							Randy		Corbett		N								
24	Employee							Aaron		Davis	Audio Depar	N				Ultimate Auc	55 N State St	Suite 230		Salt
25	Employee							Frank		Henderson	Warehouse	N				Ultimate Auc	55 N State St	Suite 230		Salt
26	Employee							Nancy		Holmes	CFO	N				Ultimate Auc	55 N State St	Suite 230		Salt
27	Vendor							Grace		Hopkins	Sales Lead	N				Insane Audio	4828 Backend Way			Salt

Instructions

How to perform a contact export:

1. On the **Reports** menu, click **Contact Export**
2. Choose the Report Format, Paper Size, and Page Orientation.
3. Click the **EMAIL ME** or **GENERATE REPORT** button.

Contact Schedule

Overview

Use the **Contact Schedule** report option to create a file that contains the schedule for a chosen contact. This report will only work if you are utilizing the crew scheduling features in Flex.

Instructions

How to generate a contact schedule report:

1. On the **Reports** menu, click **Contact Schedule**
2. Choose the Contact, Start Date, End Date, Report Format, Paper Size, and Page Orientation.
3. Click the **EMAIL ME** or **GENERATE REPORT** button.

Contacts Birthday

Overview

Use the **Contacts Birthday** report option to create a file that contains the birthday information for your contacts. This report only works if you have filled in birthday information for your contacts. (Open the contact entry information, then enter birthday information on the **Contact Info** tab).

Instructions

How to generate a contacts birthday report:

1. On the **Reports** menu, click **Contacts Birthday**
2. Choose the Number of Days to Birthday, Report Format, Paper Size, and Page Orientation.
3. Click the **EMAIL ME** or **GENERATE REPORT** button.

Contacts By Dates

Overview

Use the **Contacts By Dates** report option to create a file that contains the creation date of selected contacts.

Instructions

How to generate a contacts by date report:

1. On the **Reports** menu, click **Contacts By Dates**
2. Choose the Start Date and End Date. The report will only show contacts that were created between the entered dates.
   Note: Leaving the Start Date and End Date fields blank will return results for all contacts in your system.
3. Choose a Report Format, Paper Size, and Page Orientation.
4. Click the **EMAIL ME** or **GENERATE REPORT** button.

Decommissioned Report

Overview

The Decommissioned Report is a report that lists all of the inventory items in your Flex system that have been decommissioned. The Decommissioned Report shows the following information:

- Inventory Item Name
- Serial Number
- Barcode
- Purchase Date
- Decommission Date
- Decommissioned By
- Purchase Cost

Instructions

How to generate a Decommissioned Report:

1. On the **Reports** menu, click **Decommissioned Report**.
2. Choose a start date and an end date. The report will only show items that have been decommissioned between the dates that you choose.
   Note: Leaving the **Decommissioned Start** and **Decommissioned End** fields empty will result in the report containing all the items in your system that have been decommissioned.
3. Choose a Report Format, Paper Size, and Page Orientation.
4. Click the **EMAIL ME** or **GENERATE REPORT** button.

Deleted Items Report

Overview

The Deleted Items Report is a report that lists all of the inventory items in your Flex system that have been deleted.

Instructions

How to generate a Deleted Items Report:

1. On the **Reports** menu, click **Deleted Items Report**.
2. Choose a start date and an end date. The report will only show items that have been deleted between the dates that you choose.
   Note: Leaving the start date and end date fields empty will result in the report containing all the items in your system that have been deleted.
3. Choose a Report Format, Paper Size, and Page Orientation.
4. Click the **EMAIL ME** or **GENERATE REPORT** button.

Free Scan In Report

Overview

The Free Scan In Report is a report that lists all of the inventory items in your Flex system that have been free scanned in during a selected period.

Instructions

How to generate a Free Scan In Report:

1. On the **Reports** menu, click **Free Scan In Report**.
2. Choose a start date, an end date, and a location (if applicable). The report will only show items that have been free scanned in between the dates that you choose.
   Note: Leaving the start date, end date, and location fields empty will result in the report containing all the items in your system that have been free scanned in.
3. Choose a Report Format, Paper Size, and Page Orientation.
4. Click the **EMAIL ME** or **GENERATE REPORT** button.

Free Scan Out Report

Overview

The Free Scan Out Report is a report that lists all of the inventory items in your Flex system that have been free scanned out.

Instructions

How to generate a Free Scan Out Report:

1. On the **Reports** menu, click **Free Scan Out Report**.
2. Choose a Report Format, Paper Size, and Page Orientation.
3. Click the **EMAIL ME** or **GENERATE REPORT** button.

Maintenance Report

Overview

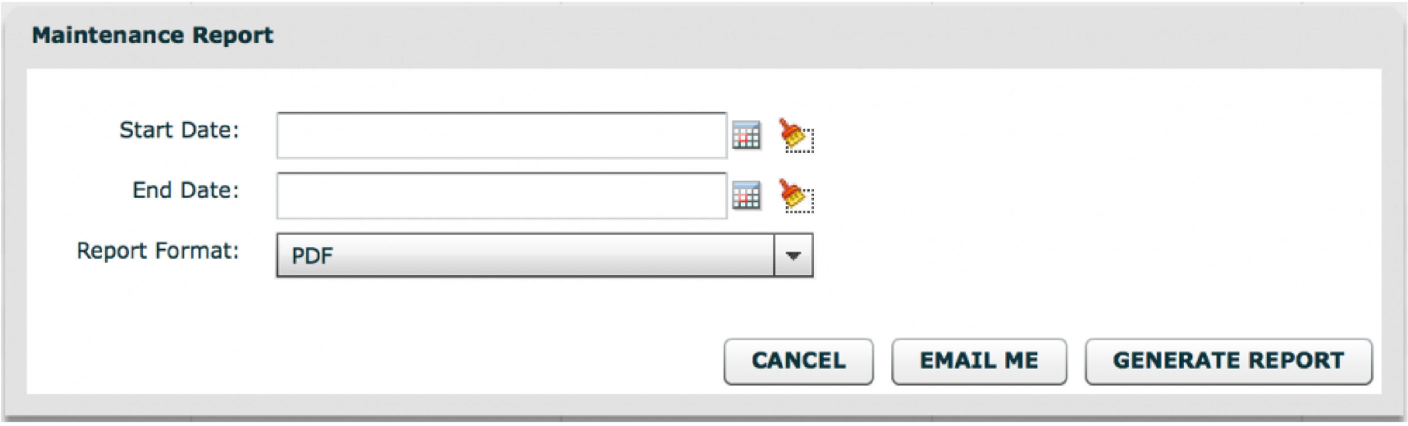
The Maintenance Report is a report that lists all of the maintenance procedures that have been performed on inventory items in your Flex system. The Maintenance Report shows the following information:

- Inventory Model Name
- Stencil
- Barcode
- Service Date
- Performed By
- Summary of Maintenance
- Procedure
- Cost

Instructions

How to generate a Maintenance Report:

1. On the **Reports** menu, click **Maintenance Report**.
2. Choose a start date and an end date. The report will only show items that have received maintenance between the dates that you choose.
   Note: Leaving the **Start Date** and **End Date** fields empty will result in the report containing all the items in your system that have had maintenance reports performed on them.
3. Choose an option from the **Report Format** menu (PDF, EXCEL, or WORD).
4. Click the **EMAIL ME** button to email the report to the email address associated with your user name, or the **GENERATE REPORT** button to download the file.


Maintenance Report
Start Date:
End Date:
Report Format:
PDF
CANCEL
EMAIL ME
GENERATE REPORT

Out of Commission Report

Overview

The Out of Commission Report is a report that lists all of the inventory items that are marked “Out of Commission” in your Flex system. The Out of Commission Report shows the following information:

- Inventory Item Name
- Quantity
- Barcode
- Serial Number
- Out of Commission (OOC) Date
- Out of Commission (OOC) By
- Reason

Inventory items can be removed from the Out of Commission Report by resolving the out of commission record on the item.

Instructions

How to generate an Out of Commission Report:

1. On the **Reports** menu, click **Out of Commission Report**.
2. Choose an option from the **Report Format** menu (PDF, EXCEL, or WORD).
3. Click the **EMAIL ME** button to email the report to the email address associated with your user name, or the **GENERATE REPORT** button to download the file.

Service Rate Sheet

Overview

Use the **Service Rate Sheet** report option to create a file that contains all services in your system with pricing information. The **Service Rate Sheet** shows the following information:

- Name (of service offering)
- Description (if entered)
- Cost (optional)
- Price

Instructions

How to generate a **Service Rate Sheet** report:

1. On the **Reports** menu, click **Service Rate Sheet**.
2. Choose a Pricing Model and Currency (both required).
3. Choose whether to show Cost and Zero Price Items.
4. Choose the Report Format, Paper Size, and Page Orientation.
5. Click the **EMAIL ME** or **GENERATE REPORT** button.

Shortage Report

Overview

Use the **Shortage Report** option to create a file that contains all equipment conflicts caused by jobs in your system. The **Shortage Report** shows the following information:

- Conflict (the job name)
- Group (Inventory group of the item)
- Item
- Size (if used)
- Type (quote, pull sheet, invoice, etc.)
- Ship Date
- Location (your warehouse)
- QTY (the amount of the item that you are short)

Instructions

How to generate a **Shortage Report**:

1. On the **Reports** menu, click **Shortage Report**.
2. Choose a Time Window (the number of days into the future that you want to check for shortages).
3. Choose the Report Format, Paper Size, and Page Orientation.
4. Click the **EMAIL ME** or **GENERATE REPORT** button.

Shortage Report By Group

Overview

Use the **Shortage Report By Group** report option to create a file that contains all equipment conflicts caused by jobs in your system sorted by inventory group. The **Shortage Report By Group** report shows the following information:

- Group (Inventory group of the item)
- Item
- Size (if used)
- Conflict (the job name)
- Type (quote, pull sheet, invoice, etc.)
- Ship Date
- Location (which warehouse the item is shipping from)
- QTY (the amount of the item that you are short)

Instructions

How to generate a **Shortage Report By Group** report:

1. On the **Reports** menu, click **Shortage Report By Group**.
2. Choose a Time Window (the number of days into the future that you want to check for shortages).
3. Choose the Report Format, Paper Size, and Page Orientation.
4. Click the **EMAIL ME** or **GENERATE REPORT** button.

Sold Report

Overview

Use the **Sold Report** option to create a file that contains all items in your system that have been marked as sold. The **Sold Report** shows the following information:

- Item Name
- Serial Number
- Barcode
- Sold Date
- Sold Cost
- Purchase Date
- Purchase Cost

Instructions

How to generate a **Sold Report**:

1. On the **Reports** menu, click **Sold Report**.
2. Choose a Start Date and End Date (these are optional, and if you don't select any the report will return all results).
3. Choose the Report Format, Paper Size, and Page Orientation.
4. Click the **EMAIL ME** or **GENERATE REPORT** button.

Unfilled Labor Roles

Overview

Use the **Unfilled Labor Roles** report option to create a file that contains all unfilled labor roles (between certain dates) in your system sorted by job.

Instructions

How to generate an **Unfilled Labor Roles** report:

1. On the **Reports** menu, click **Unfilled Labor Roles**.
2. Choose a Start Date and End Date (the report will pull all unfilled labor roles between these dates).
3. Choose the Report Format, Paper Size, and Page Orientation.
4. Click the **EMAIL ME** or **GENERATE REPORT** button.

Unreturned Items By Item Group

Overview

Use the **Unreturned Items By Item Group** report option to create a file that contains all unreturned items in your system sorted by the inventory group that they belong to.

Instructions

How to generate an **Unreturned Items By Item Group** report:

1. On the **Reports** menu, click **Unreturned Items By Item Group**
2. Choose the Report Format, Paper Size, and Page Orientation.
3. Click the **EMAIL ME** or **GENERATE REPORT** button.

Unreturned Items By Manifest

Overview

Use the **Unreturned Items By Manifest** report option to create a file that contains all unreturned items in your system sorted by the manifest they were last scanned to.

Instructions

How to generate an **Unreturned Items By Manifest** report:

1. On the **Reports** menu, click **Unreturned Items By Manifest**
2. Choose the Report Format, Paper Size, and Page Orientation.
3. Click the **EMAIL ME** or **GENERATE REPORT** button.

System Settings Menu

Overview

There are many system settings that can be adjusted in Flex. Before adjusting any settings, we highly recommend reviewing the manual section for those settings.

- Automated Functions
- Backup History
- Barcode Printing
- Business Locations
- Business Rules
- Corporate Identities
- Currencies
- Custom Fields
- Custom Reports
- Departments
- Duplicate Barcodes
- E-Mail Blast
- Embedded Reports
- External Authenticators
- GL Accounts
- Holiday Schemes
- Icon Library
- Integration Bus
- Labor Unions
- Numbering Schemes
- Password Policies
- Payment Terms
- Pricing Models
- Production Exchange
- Production Tasks
- Raw Printer Templates
- Raw Printers
- Rebuild Resource Indexes
- Report Groups
- Report Preferences

- Resource Audit Trail
- Resource Types
- Safe Work Methods
- Sales Tax Rules
- Security Groups
- Security Policies
- Sensitive Search Tokens
- Service Offerings
- Shipping Methods
- Skills & Qualifications
- Sound Clips
- Sound Themes
- Spell Check Engine
- Standard Discounts
- Static Reports
- Status Options
- Tags
- Terms & Conditions
- Test Quality Agent
- Text Templates
- Units Of Measure
- Users

Automated Functions

Coming soon…

Backup History

Overview

The **Backup History** page shows the backup files of your system that are automatically created each day. You can download the backup files if you want to store them somewhere. Only Flex Support can restore your system to any of the backup files listed.

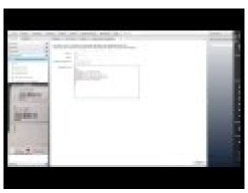
Barcode Printing

!https://img.youtube.com/vi/3F_SH_860Es/default.jpg!h2. Overview

You can print barcodes directly from Flex to your barcode printer. The **Barcode Printing** menu option on the **System Settings** menu is used to set up barcode print preferences after you have designed a barcode label template and properly configured your barcode printer. See Raw Printer Templates and for more information.Raw Printers for more information.

Instructions

The following is a 30 minute webinar that explains how to modify your barcode label templates and set up barcode print preferences:

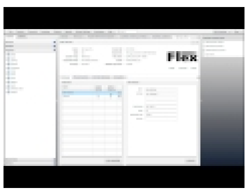


Business Locations

Overview

A **business location** is where your company's operations take place. Most Flex customers operate from a single business location, which is generally a warehouse where inventory items are shipped and returned. Some customers have multiple business locations and need to control the inventory and operations of each one separately.

Instructions



How to edit a business location:

1. On the **System Settings** menu, click **Business Locations**.
2. Double click on the business location that you want to edit.
3. Click **Edit Business Location** in the **Workbench Menu** to edit business location header items.
4. Edit information as needed.
    - **Holiday Scheme** is an advanced feature that will be covered in a later lesson.
    - **Default Terms and Conditions**: Must be in RTF format. Accepted fonts: Arial, Georgia, Calibri, Helvetica, Times Roman. Recommended font size: 7-10pt depending on document length. Generally, a smaller font is recommended for larger documents.
    - **Logo Scale to Fit**: Select **Yes** to customize logo size (in pixels). Select **No** if your logo is already the desired size.
5. Click **Update**
6. Click through the tabs directly under the header section to add and edit addresses, phone numbers, internet addresses, and (if applicable) Production Exchange information.

> **!** Deleting a business location does not remove the location from your Flex subscription. Contact Flex Sales to fully remove a business location from your Flex subscription.

Business Rules

Coming soon…

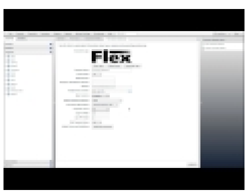
Corporate Identities

Overview

A **corporate identity** is the identity of your company. Multiple corporate identities can be at a single business location. For example, if an audio/video rental company also operates a recording studio from their warehouse, they can set up a new corporate identity for the recording studio and bill their clients under the name of the recording studio corporate identity.

A single corporate identity is included in your Flex subscription. Contact Flex Sales to learn more about pricing for multiple corporate identities. (View our Best Practices video on how to Manage Multiple Corporate Identities)

Instructions



How to edit an existing corporate identity:

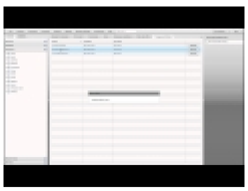
1. On the **System Settings** menu, click **Corporate Identities**.
2. Double-click on the name of the corporate identity that you want to edit.
3. Upload your company logo by clicking **Upload Logo**.
4. Edit the desired fields.
5. Click **Update**.

Currencies

Overview

You can set up multiple currencies in your Flex system and set up inventory and service pricing for each currency. Flex Support will set up your system to use the common currency in your area.

Instructions



How to add a new currency:

1. On the **System Settings** menu, click **Currencies**.
2. Click **New Currency** in the **Workbench Menu**.
3. Enter the new currency information:
    - **Name**: The name of the currency. (ex. US Dollar, Euro, etc.)
    - **ISO Code**: International Organization for Standardization currency code. (ex. USD, EUR, etc.)
    - **Locale**: Locale settings will affect the appearance of your currency. (ex. comma or decimal to split dollars and cents)
    - **Issuing Authority**: Optional
    - **Exchange Rate**: Optional (you will likely have to change this field as often as exchange rates change, which could be daily)
4. Click **CREATE**.

Any screen where you can input pricing will have a tab with the new currency where you can input separate pricing information for that currency. You can also set up a default currency for each contact in your system on the **Terms/Notes** tab of a contact entry.

You can edit any currency by double-clicking on the currency name while on the **Currencies** tab.

How to choose a default currency for a business location:

1. On the **System Settings** menu, click **Business Locations**.
2. Double-click on the business location that you want to edit.
3. Click **Edit Business Location** in the **Workbench Menu**.
4. Choose which currency to be the default in the **Currency** field.
5. Click **UPDATE**

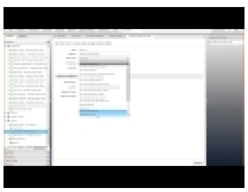
Custom Fields

Overview

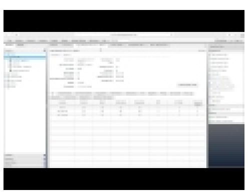
You can create custom fields to appear in a variety of locations in Flex, like a contact entry page, inventory model page, and more. Custom fields are helpful when you want to input information that Flex does not offer as a default field.

Instructions

Here is a webinar explaining how to add custom fields to a contact entry:



Here is a webinar explaining how to add custom fields to inventory models and serial units:



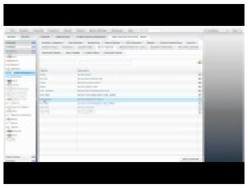
Custom Reports

Overview

Flex Support can design a custom report for your company that can be uploaded and used in your Flex system. Custom reports can include or exclude whatever information you want. For example, you might want a quote report to send to your clients that only shows certain information in the header and certain information per line item.

Email Flex Support with your custom report request and they will respond with an estimate on how much the custom report will cost and how long it will take. All custom reports are then uploaded into your system on the **System Settings** menu and **Custom Reports**.

Departments



Duplicate Barcodes

Overview

The **Duplicate Barcodes** tool helps you find duplicate barcodes in your system and allows you to easily change item barcodes if need or delete items entirely.

Instructions

To use the **Duplicate Barcodes** tool, go to the **System Settings** menu, then click **Duplicate Barcodes**. A list of items with duplicate barcodes will be shown.

You can click into the barcode field and change the barcode from this screen. If one of the duplicate items is unnecessary, then you can check the box (on the left side of the row), then click the Delete Selected button. This will delete the item from your system.

E-Mail Blast

Overview

Flex system administrators can send emails to their users through Flex.

Instructions

On the **System Settings** menu, click **E-Mail Blast**. Give the email a subject, and type the email content in the **Message** field. Your email address will automatically default in the **From Address** field.

Next, check the box next to any user that you want to send the email to. If you want to send to all users, click the **All** header and all boxes will be checked. You can also filter options that show in the **Recipients** section by choosing a security group from the **Recipient Group** section. This will only show users from the chosen security group.

Click **SEND MAIL** and your email will be sent.

Embedded Reports

Overview

Embedded Reports in Flex are the pre-designed reports that are included in every copy of Flex. The .jrxml file for these reports can be downloaded and altered with an XML editing program.

Instructions

How to download an embedded report:

1. On the **System Settings** menu, click **Embedded Reports**.
2. Find the name of the report that you want to download and click the **DOWNLOAD** button.

This will download a .jrxml file with the source code of that report. The file can be opened in an XML editing program, then the edited version can be uploaded into your Flex system.

! We only recommend custom report programming to advanced users who are familiar with XML editing. For all other custom reporting needs, please refer to the Custom Reports Section.

External Authenticators

Coming soon…

GL Accounts

Coming soon…

Holiday Schemes

Coming soon…

Icon Library

Integration Bus

Coming soon…

Labor Unions

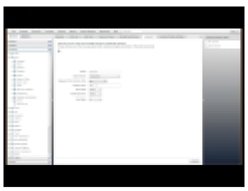
Coming soon…

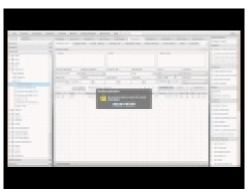
Numbering Schemes

Overview

You can set up a variety of numbering schemes in your Flex system. The two video examples below show how you can manage numbering schemes for your inventory and your project elements (quotes, pull sheets, invoices, etc).

Instructions



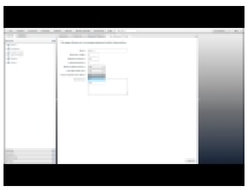


Password Policies

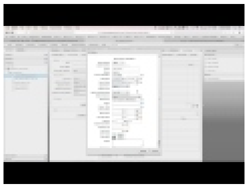
Overview

Password policies are a set of rules that determine the types of passwords that users can use in your system.

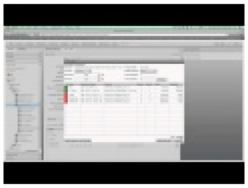
Instructions

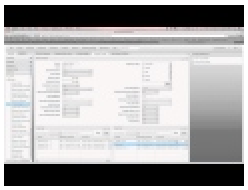


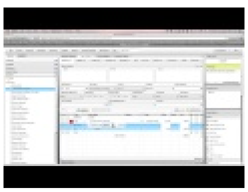
Payment Terms

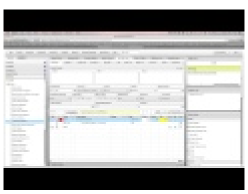


Pricing Models





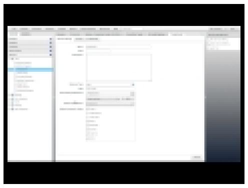




Production Exchange

As of April 2015, Production Exchange is no longer operating. All references to Production Exchange are scheduled to be removed from Flex.

Production Tasks



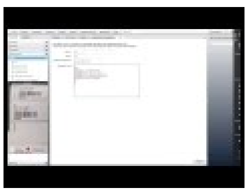
Raw Printer Templates

Overview

The **Raw Printer Template** section is where you can edit the look of the barcode labels that are automatically printed from Flex. The EPL2 language is used to configure barcode labels in Flex. Here is a link to the EPL2 language programming guide: http://www.servopack.de/support/zebra/EPL2_Manual.pdf

Instructions

The following video is of a webinar on designing barcode labels to be used with Flex:



Raw Printers

Overview

Flex supports Zebra brand barcode printers that use the EPL2 programming language and are Wifi or Ethernet connected.

> ! USB barcode printers are NOT compatible with Flex.

Check out our recommendations page on BarcodesInc.com for barcode printer, labels, and printer ribbon recommendations

Instructions

Note: Do not perform the installation steps included with the printer. Follow the steps below.

How to set up a barcode printer to work with Flex:

1. Obtain a Static (public) IP or set a static hostname (one is required). If you don't currently have a static ip or a static hostname, contact your ISP or an IT professional for assistance.
2. Assign an Internal IP to your Zebra barcode printer (in router administration).
3. Port forward 9100 to printer's assigned IP.
4. Email Support with the subject "Barcode printer Setup Assistance Requested". Include the Static IP/ hostname and your barcode label dimensions.

If you are unsure how to make the proper configurations to complete a successful setup, contact an IT professional. Flex does not assist with network configurations.

Rebuild Resource Indexes

Coming soon…

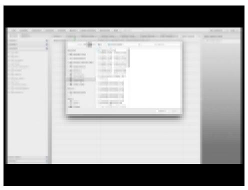
Report Groups

Overview

Report groups can be used to add options to the “print” popup for reports.

Instructions

Report groups are covered at the 15:10 mark in this video:



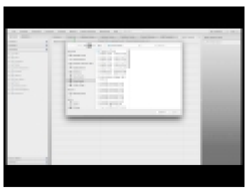
Report Preferences

Overview

You can set preferences for each report in your system. For example, you can choose which security groups are allowed to print a report.

Instructions

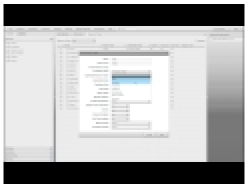
Report preferences are covered at the 13:12 mark in this video:

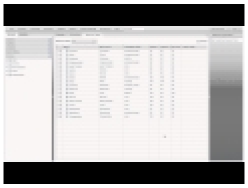


Resource Audit Trail

Coming soon…

Resource Types





Safe Work Methods

Coming soon…

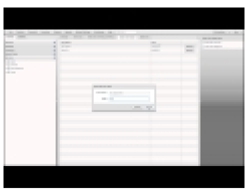
Sales Tax Rules

Overview

Each resource type in Flex can have sales tax automatically applied to it. For example, you can have sales tax automatically apply to rental and retail items, but not to labor and travel. It all depends on how your company operates.

You also have the ability to apply a different sales tax rate for each of your business locations if your subscription includes more than one location. This would be especially applicable to customers who have multiple locations in different states.

Instructions



How to set up sales tax:

1. On the **System Settings** menu, click **Sales Tax Rules**.
2. Double-click **Sales Tax**.
3. Click the value that you want to edit. Enter a percentage value in each category that you want to charge sales tax (example: 5% = 5).
   Note: Each value will automatically save. There is no save button on this page.

How to set up a new sales tax rule:

1. On the **System Settings** menu, click **Sales Tax Rules**.
2. Click **New Sales Tax Rule** in the **Workbench Menu**.
3. Give the new rule a name and a code (example: Name: New Tax Rule. Code: NEWRULE).
4. Click **CREATE**.

> Business Rule Set and Sales Tax Categories are advanced features. Email Support for help with these features.

Security Groups

Overview

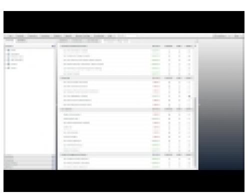
Each Flex system user is assigned to a security group. Users are granted specific system permissions based on the security group to which they are assigned. For example, a warehouse employee who is assigned to the Shop Techs security group will only have permission to access warehouse related parts of the system.

Your Flex system includes the following security groups:

- Accounting
- Administrators
- Inventory Managers
- Management
- Registered Users
- Restricted
- Sales Reps
- Shop Techs

You can add other security groups if needed.

Instructions



How to change security group permissions:

1. On the **System Settings** menu, click **Security Groups**.
2. Click the **PERMISSIONS** button in the row of the security group that you want to edit.

3. Select either **DENY** or **GRANT** for each option.

Inventory Module	STATUS	INHERIT	DENY	GRANT
Can Conduct Inventory Counts	DENIED			
Can View Inventory Financial Information	GRANTED			
Can Manage Inventory Financial Information	DENIED			
Can Manage Maintenance Procedures	DENIED			

Note: If the security group is based on another security group, the **INHERIT** selection will apply the attributes of a parent security group.

4. Close the **Permissions** tab. All selections are automatically saved.

How to create a new security group:

1. On the **System Settings** menu, click **Security Groups**.
2. In the **Workbench Menu**, click **New Security Group**.
3. Enter the details of the new security group:
   - **Name**: Examples: Account Managers, Quote Managers,
   - **Description**: Details about the security group.
   - **Member Groups**: Groups that you want to inherit the permissions of this group.
   - **Security Policy**: Learn how to create security policies.
4. Click **CREATE**.

Security Policies

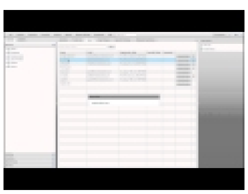
Overview

A security policy is a rule that can deny access to a Flex system user based on time or IP address. A security policy can be assigned to either a single user or an entire security group.

For example, maybe you don't want members of the Shop Techs group accessing Flex from anywhere besides the warehouse. You can create a security policy that will only allow Flex access when a user is on a certain IP address. In this case, you would find out your IP address and put it in the **White Listed Networks** area of the security policy.

You could also restrict Flex access based on day and time. If you don't want members of the Shop Techs group accessing Flex on weekends, you can include that under the **Time Restrictions** area of the security policy.

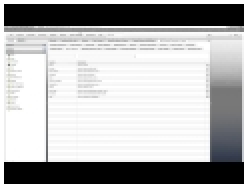
Instructions



How to create a new security policy:

1. On the **System Settings** menu, click **Security Policies**.
2. Click **New Security Policy** in the **Workbench Menu**.
3. Give the new policy a name, description, and choose whether or not it should be enabled.
4. Click **CREATE**. This will cause the IP address and time restriction options to appear.
5. Add and edit the IP address and time restriction options based on the nature of your security policy.
6. Click **UPDATE**.

Sensitive Search Tokens

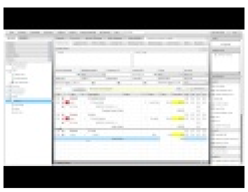


Service Offerings

Overview

Service Offerings are services that you want to charge to your customers. This can include labor, show expenses, travel, and more. You learned how to create new resource types for services in the last lesson. Now, you will learn how to fill those folders with a variety of services, each with their own attributes and pricing.

Instructions



How to add a new service offering:

1. On the **System Settings** menu, click **Service Offerings**.
2. Click **New Service Offering** in the **Workbench Menu**.
   Note: Alternatively, you can right-click on a Services folder in the **Resource Browser**, then click **New Service Offering…**
3. Enter the necessary information
   - **Name**: The name that will appear in the resource browser and on quotes.
   - **Code**: Optional code for internal Flex purposes.
   - **Description**: Optional description to provide more information about the service offering.
   - **Resource Type**: The Services folder that this service offering will appear in.
   - **Tags**: Optional
   - **Associated Qualifications**: Choose the qualification that this service offering is related to.
   - **Default Qualification**: Choose the qualification that this service offering is related to.
   - **Default Production Tasks**: Production tasks that this service offering will take part in.
   - **Create Corresponding Role**: Check the box to create a corresponding role.
4. Click **CREATE**.

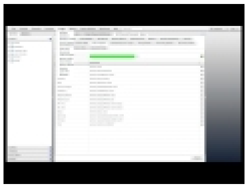
The information screen for the new service offering will automatically open. You can make changes to the service offering from here. Click on the **Pricing** tab to enter pricing information. If you have multiple

currencies set up in your system, you will have to set a price for each currency and each pricing model that you want to use.

> * If you can’t enter a cost or price, make sure that the pricing model’s check box is checked.

The new service offering will now appear in the folder (resource type) that you chose, and can be placed into a quote.

Shipping Methods

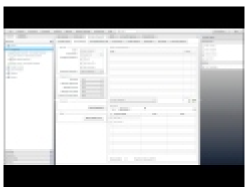


Skills & Qualifications

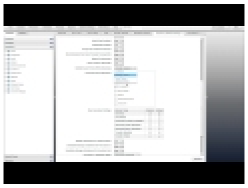
Overview

Skills and Qualifications can be assigned to contacts in your Flex system, and are especially useful when using the Staffing Assistant.

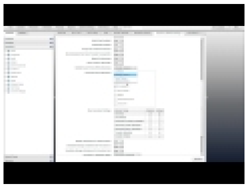
Instructions



Sound Clips



Sound Themes



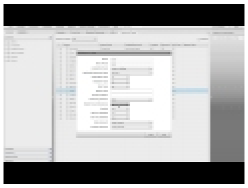
Spell Check Engine

Introduction

There are five spell check engines built into Flex: English, Spanish, French, Italian, and Portuguese. Choose which spell check engine that you want to use in your Flex system and click **SAVE**.

The spell check engine runs a spell check on all text entered into text areas within Flex.

Standard Discounts



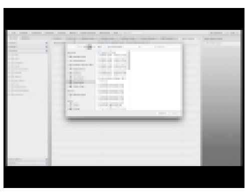
Static Reports

Overview

Static reports are non-dynamic reports (a report that does not pull information from Flex) that can be added and used in your Flex system. A common example of a static report is a credit card authorization form. The form can be built and designed in an outside program, then uploaded into your Flex system as a static report (in .pdf format). You can then choose to use this report when printing (or sending to clients) quotes, invoices, and other elements.

Instructions

The following video contains information about static reports starting at the 8:45 mark.



Status Options

Coming Soon…

Terms & Conditions

Coming Soon…

Test Quality Agent

Overview

The **Test Quality Agent** is a way to test the error reporting system within Flex. When you click the **Test Quality Agent** (on the **System Settings** menu), the error reporting window will pop up with the following message:

“Quality Feedback Agent Test Notification. This is only a test intended to verify correct operation of the feedback agent for this system.”

The **Test Quality Agent** is typically only used by Flex Support to verify that the error reporting system is working properly within your system.”

Units Of Measure

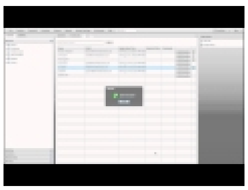
Coming Soon…

Users

Overview

A Flex system user is an individual who has access to your company's Flex system. Generally, Flex system users are the employees of your company.

Instructions



How to add a Flex system user:

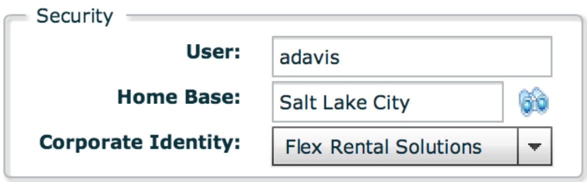
1. On the **System Settings** menu, click **Users**.
2. Click **New User** in the **Workbench Menu**.
3. Enter the new user information:
    - **Name**: Employee name, first and last.
    - **User ID**: This will be the user's log in name.
    - **Locked**: Choosing **Yes** will block this user from accessing Flex.
    - **Security Policy**: Learn how to create security policies.
    - **External Authenticator**: Advanced option.
    - **Default Group**: The security group that this user will belong to.
    - **Group Membership**: The security group that this user will belong to.
    - **Require Password Change**: Choose **Yes** to require this user to change their password upon their first login.
    - **Password**: The temporary password you will give to this user for their first login.
    - **Verification**: Verify the above password.
4. Click **CREATE**.

Note: You can edit existing Flex system users by double-clicking on their name on the **Users** tab. You can also click the **PERMISSIONS** button next to the user name to give them individual permissions that will supersede their security group permissions.

! To properly complete this process, each Flex system user needs to be linked a contact entry. See instructions below.

How to link a Flex system user to a contact entry:

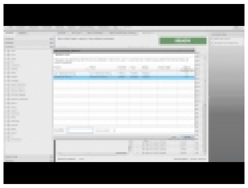
1. Create a contact entry for the Flex system user. (Learn how to add and edit contacts if you haven't already.)
2. On the user's contact page, click on the **Terms/Notes** tab.
3. In the **Security** section, enter the user's Flex system user name, home base location, and corporate identity (if applicable).



4. Close the contact entry page when finished. The **Security** section information is automatically saved.

Warehouse Menu

Free Scan In

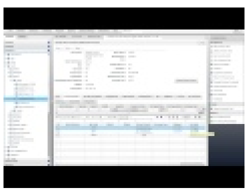


Free Scan Out

Overview

Sometimes you might have to scan equipment that isn’t assigned to a job out of your warehouse. Using the free scan out feature will allow you to do this. We typically recommend always creating a job and scanning equipment out from a pull sheet. But the free scan out feature can be useful when you have to quickly remove something from your inventory without creating a job. The scanned items can then be assigned to a job later.

Instructions



How to free scan equipment out:

1. On the **Warehouse** menu, click **Free Scan Out**.
2. Scan the barcode on each piece of equipment you are scanning out.

The scanned equipment is now removed from available inventory, but not assigned to a specific job or event.

Assigning Free Scanned Out Equipment to a Job

If you free scanned out some equipment and want to assign it to a job or event later, then you can use the **Choose from Free Scan Out** option from the prep screen of a job.

For example, say you had a customer call and they needed a projector immediately. If you didn’t have time to create a quote or pull sheet for the customer, then you can free scan the projector out. Then, you can go back and create a quote or pull sheet with the projector on it and assign the free scanned out project to that job.

How to assign free scanned out equipment to a job:

1. When on the prep screen for a job, click **Choose from Free Scan Out** in the **Workbench Menu**. A new window will open within the prep screen.
2. Double-click the barcode from the free scanned out list that appears in the window.

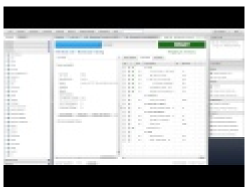
Any barcode you double-click will be assigned to the manifest of the current job you are prepping.

Prep Pull Sheet

Overview

Scanning equipment out from a pull sheet is the recommended method of scanning out. This is because each item scanned out from a pull sheet will have a scan record that includes which pull sheet (for a specific job or event) it was scanned out from.

Instructions



How to scan out from a pull sheet:

1. With a pull sheet open, click **Go To Prep Screen** in the **Workbench Menu**.
2. Begin scanning equipment. (See scanning methods below)

The prep screen has a few options that can be helpful when scanning equipment out. Like on the pull sheet, you can delete lines or sort line items. You can choose equipment from another list, like a return manifest for another job. This is useful when you have a quick turnaround and need to send equipment from one show to another in a short amount of time. You can also choose equipment from a free scan out.

Scanning Methods

There are several method for scanning equipment out.

Use a Barcode Scanner – For serialized items, you will scan the unique barcode found on each serialized unit of the model. For non-serialized items, you will scan the model barcode, then enter the quantity that you want to scan.

Manually Enter Barcodes – You can manually enter a barcode into the barcode input box (to the right of the main menu in Flex). Like using a barcode scanner, you will manually enter unique barcodes for serialized units, and the model barcode for non-serialized items.

Virtual Scan – To virtually scan an item, double-click on the line item in the prep screen. If you virtually scan a serialized item, a window will appear asking you to select a specific serialized unit to send. If you virtually scan a non-serialized item, the quantity prompt will appear asking you to enter the quantity that you want to scan.

By default, performing a virtual scan will cause a prompt to appear, asking you to verify the virtual scan. If you want to turn this prompt off, click **Manage Prompt Preferences** in the **Workbench Menu**, then uncheck the **Virtual Scan Confirmation**. Click **SAVE** to save changes.

Undo a Scan

If you need to undo a scan, click the **UNDO LAST SCAN** button in the **Last Scan** tab. If you need to delete multiple scans, or a scan that you did earlier in the prep process, you can use the **Related Scan Records** screen. To access this screen, click the cog wheel next to the item for which you need to delete a scan, then click **Related Scan Records**. Find the barcode(s) that you want to undo, then click the check box on the right side of the row so it turns to YES. Click **ACCEPT**, then **Yes** on the confirmation screen. The selected items will go back to unscanned.

Substitute a Line

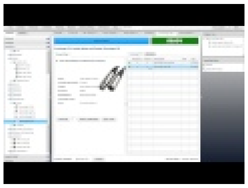
You can substitute equipment during the prep process. For example, if you don't have enough 25 foot cables to fill the order, you can substitute them for 50 foot cables. Click the cog wheel on the line for the 25 foot cables and click **Substitute Line**. A red prompt will tell you that the next item you scan will substitute for the original item (you can press escape on your keyboard to cancel the substitution scan). Now, if you scan a 50 foot cable, the scanned quantity for the 25 foot cable will increase, but the 50 foot cable will be placed on the manifest. Doing this will allow you to fulfill the quantity for the item that you don't have enough of, but still have a scan record for the item you used to substitute.

Complete and Finalize

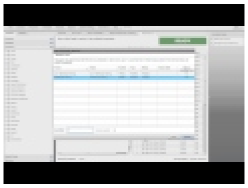
As you have been scanning, you might have noticed that a green check mark appears next to any line item that has the quantity completely fulfilled. You will also see a green check mark next to any subtotal that has been completely fulfilled.

As soon as all quantities have been fulfilled (the progress bar at the top of the screen will say 100%), you will see a prompt asking if you want to finalize the prep for the pull sheet. If you are ready to finalize, click **FINALIZE**. The job is now ready to be shipped.

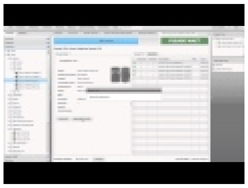
Receiving



Return Manifest



Subrental Returns



Help Menu

FLEX EMAIL SUPPORT (support@flexrentalsolutions.com)
Monday-Friday, 7:30AM-6:00PM MST

Unlimited email support is included in every Flex subscription. A full-time team of support representatives is available to answer questions and resolve issues for our Flex customers during business hours (M-F 7:30AM-6:00pm MST). Most support inquiries are handled within one business day.

To receive accurate and timely support, we ask that you be as specific as possible in all inquiries. Please provide (when applicable):

- Document numbers (e.g., Quote number 14-0012, Labor PO LPO14-0001, etc.)
- Inventory item names with barcodes (e.g., 8' tripod screen barcode 30492)
- Specific details of when and how an issue occurred. Example: "At 3:00pm, I was working on quote number 14-0012 when I added an 8' tripod screen (barcode 30492) and found that I was unable to edit the day rate pricing information."
- Screenshots or videos detailing your question or issue. We recommend using Jing, which allows you to create and share screenshots and videos for free.

Flex support representatives use an internal support tracker to organize and assign inquiries. This system works best when support requests are limited to **one inquiry** per email.

> **!** In the rare occurrence that your system is down during off hours, email support@flexrentalsolutions.com with the subject "Flex System is DOWN." A support agent is always on call during off hours.

FLEX USER FORUM
forum.flexrentalsolutions.com

The Flex User Forum is a thriving community where you can interact with other Flex customers. In the forum, customers can share advice and offer support to each other. To receive the best support, we recommend following the email support guidelines (found in the above section) when posting in the forum.

All customers must register to use the forum. Your Flex system user name and password **will not work** as login credentials for the forum. Separate registration is required.

Please note: Posting to the Flex User Forum does not guarantee a response from a Flex support representative. To receive guaranteed support, email support@flexrentalsolutions.com and follow the email support guidelines (listed under the 'Flex Email Support' heading).

YOUTUBE PAGE

youtube.com/flexrentalsolutions

The Flex YouTube Page offers a variety of instructional videos to help Flex customers.

TWITTER FEED

twitter.com/flexrental

ENGINEERING BLOG

blog.flexrentalsolutions.com

The Engineering Blog is managed by the software development team and offers a detailed look into the programming process behind Flex.

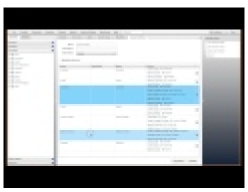
ONLINE AND ON-SITE TRAINING

Any Flex customer can receive one-on-one training either online or in person. Contact sales@flexrentalsolutions.com to receive more information about one-on-one training and pricing options. Additionally, we offer implementation services where a Flex support representative will personally assist you in implementing Flex.

Permissions Glossary

Permissions in Flex are organized into six different sections. Click on a section below to view the permissions associated with it, as well as a description of how a user is affected when that permission is DENIED.

- Contact Management Module
- Business Operations
- Project Management Module
- Financials Module
- Inventory Module
- Core System



Project Management Module

PERMISSION	IF PERMISSION IS *DENIED*
Can Configure Project Elements	The user will not be able to view the following areas: • Crew Schedule Settings (on the **Contacts** menu) • Project Elements (on the **Projects** menu) • Consolidated Copy Profiles (on the **Projects** menu) • Workflow (on the **Projects** menu)
Can Manage Calendar Templates	The user will not be able to edit any calendar settings (e.g. Element Types, Global Status, Location, EDIT button settings), except on their own My Calendar. The user will not be able to view the following areas: • Calendar Templates (on the **Projects** menu)
Can Manage Project Elements	The user will not be able to create a new element (quote, invoice, pull sheet, etc). The user will not be able to execute the following actions on any element: • Add line items (inventory, services, etc.) • Delete line items • Paste line items • Create custom subtotals • Apply trading terms • Edit line item details (type, quantity, notes, time, price, etc.) • Check or uncheck line item mute boxes (WM, PM, TM, LM, NM) • Reset pricing • Assign staff to labor roles • Clear staff from labor roles • Edit header information • Add child elements • Copy (the entire element) • Delete (the entire element) • Move (the entire element) • Add notes • Execute workflow actions • Execute any logistic actions • Sort line items (on equipment lists) • Create a partial pull sheet • Finalize or Unfinalize (equipment lists)

Can Delete Project Elements	The user will not see the **Delete** option in the workbench menu (right-hand side) of an element.
Can View Project Elements	The user will not be able to open any element (quote, invoice, pull sheet, etc). The user will not be able to view any of the element lists from the **Projects** menu. When the user logs in, calendars will not be visible (since calendars contain elements).
Can Change Document Numbers	The user will not be able to change an element's document number (a lock appears next to the document number when the user enters the **Edit Header** window).
Can Sync With Google Calendars	The user will not be able to view **Google Calendar Settings** on the calendar screen.
Can Sync With Facebook Events	The user will not be able to view **Facebook Events Settings** on the calendar screen.
Can Configure Conflict Resolvers	The user will not be able to view Conflict Resolvers (on the **Projects** menu).
Can View Tasks for All Users	The user will not be able to view any other task except their own. (When this permission is GRANTED, the user will see a check box along the top of the **To Do List** tab that says "Show for All Users".)

Business Operations >>

Business Operations

PERMISSION	IF PERMISSION IS *DENIED*
Can Manage Icon Library	The user will not be able to add, change, or delete icons from the icon library. The user will not be able to view the **Icon Library** (on the **System Settings** menu).
Can Manage Critical Settings	The user will not be able to edit Project Settings or E-Mail Templates (both on the **Projects** menu). The user will not be able to view the following areas: • Automated Functions (on the **System Settings** menu) • Business Locations (on the **System Settings** menu) • Business Rules (on the **System Settings** menu) • Corporate Identities (on the **System Settings** menu) • Currencies (on the **System Settings** menu) • Custom Reports (on the **System Settings** menu) • Departments (on the **System Settings** menu) • Duplicate Barcodes (on the **System Settings** menu) • Embedded Reports (on the **System Settings** menu) • GL Accounts (on the **System Settings** menu) • Holiday Schemes (on the **System Settings** menu) • Labor Unions (on the **System Settings** menu) • Numbering Schemes (on the **System Settings** menu) • Payment Methods (on the **System Settings** menu) • Payment Terms (on the **System Settings** menu) • Pricing Models (on the **System Settings** menu) • Production Tasks (on the **System Settings** menu) • Raw Printer Templates (on the **System Settings** menu) • Raw Printers (on the **System Settings** menu) • Report Groups (on the **System Settings** menu) • Report Preferences (on the **System Settings** menu) • Resource Types (on the **System Settings** menu) • Safe Work Methods (on the **System Settings** menu) • Shipping Methods (on the **System Settings** menu) • Skills and Qualifications (on the **System Settings** menu) • Standard Discounts (on the **System Settings** menu) • Static Reports (on the **System Settings** menu) • Status Options (on the **System Settings** menu) • Units of Measure (on the **System Settings** menu)

	• Suggestion Types (on the **Inventory** menu)
Can View Pricing Information	The user will not be able to view the following areas: • Trading Terms and Bill Rates of a contact • The Pricing tab of an inventory model • The Pricing tab of a service offering • Pricing Models (on the **System Settings** menu) • Standard Discounts (on the **System Settings** menu) • Service Offerings (on the **System Settings** menu) • Payment Terms (on the **System Settings** menu)
Can Manage Pricing Information	The user will not be able to manage/edit the following areas: • Bill Rates (on the **Terms/Notes** tab of a contact record) • The Pricing tab of an inventory model • The GL Accounts tab of an inventory model • The Pricing tab of a service offering • The GL Accounts tab of a service offering • Pricing tiers in a pricing model
Can View Sensitive Search Tokens	The user will not be able to view any search token that is checked in the sensitive search token list (on the **System Settings** menu)
Can Manage Sensitive Search Tokens	The user will not be able to view the following areas: • Sensitive Search Tokens (on the **System Settings** menu)

<< Project Management Module | Inventory Module >>

Inventory Module

PERMISSION	IF PERMISSION IS *DENIED*
Can Conduct Inventory Counts	The user will not be able to access any inventory counts, including the Current Counts (on the **Warehouse** menu) and Scheduled Inventory Counts (on the **Inventory** menu). The user will not be able to use the Reset for Physical Inventory Count option in the workbench menu of inventory models.
Can View Inventory Financial Information	The user will not be able to see view the Pricing tab, replacement cost, average cost, and purchase cost on inventory model pages.
Can Manage Inventory Financial Information	The user will not be able to change the pricing of an inventory model.
Can Manage Maintenance Procedures	The user will not be able to log maintenance on an inventory item.
Can Manage Inventory	The user will not be able to view the Catalogue Worksheet, Inventory Settings, and Maintenance Procedures (all on the **Inventory** menu). The user will not be able to execute the following actions: • Create new inventory items • Edit existing inventory items • Copy inventory items • Mark a serial unit as out of commission (OOC) • Add units to or remove units from a container (i.e. serialized package, and serialized storage containers)
Can Add New Inventory	The user will not be able to add new inventory models or add new serial units to an inventory model.
Can View Inventory	The user will not be able to view inventory items. The user will still be able to see inventory names in the inventory browser, but will not be able to open them and view details. The user will not be able to view the following areas: • Catalogue Worksheet (on the **Inventory** menu) • Inventory Manager (on the **Inventory** menu) • ROI Dashboard (on the **Inventory** menu) • Resolve Shortages (on the **Inventory** menu)

Can Delete Inventory Items	The user will not be able to delete inventory models or serial units.
Can Manage Inventory Groups	The user will not be able to see the Inventory Group Manager when right-clicking on an inventory group. The user will not be able to drag and drop (to reorganize) inventory folders or inventory models within the inventory tree.
Can Force Shortage During Scan Process	The user will not be able to scan gear (on the prep screen) to a job if that gear is already booked on another job during the same time. (A prompt window will appear saying that “Taking this item will create a shortage” and the ACCEPT button will be greyed out, not allowing the user to proceed.)
Can Change Quantities	The user will not be able to manually change quantities of a non-serialized model (on the Qty tab of the inventory model page).
Can Scan Equipments In & Out	The user will not be able to scan any item in or out on any warehouse/scanning screen (prep screen, return screen, free scan in screen, free scan out screen, etc).
Can Virtually Scan Serialized Items	The user will not be able to virtually scan serialized items. (They will still be able to virtually scan non-serialized items).
Can Virtually Scan All Items In/Out	The user will not be able to use the Scan All Items In/Out in the workbench menu of the prep screen and return screen.
Can Browse & Search Hidden Items	The user will not be able to view any inventory item that is marked as hidden in its settings.
Can Manage Warehouse Prompts	The user will not be able to view the Manage Prompt Preference or Enable All Prompts options when on any warehouse/scanning screen.
Can Perform Mark As Overrides	More info soon…

<< Business Operations | Contact Management Module >>

Contact Management Module

PERMISSION	IF PERMISSION IS *DENIED*
Can View and Search Contacts	The user will not be able to open a contact record and view contact details. The user will not be able to enter a contact on any element (quote, PO, invoice, etc). The user will not be able to view the **Contact Manager** (on the **Contacts** menu).
Can Create and Manage Contacts	The user will not be able to create a new contact. The user will not be able to edit any contact details. The user will not be able to view **New Contact** and **New Company** (both on the **Contacts** menu).
Can Delete Contacts	The user will not be able to delete a contact.

<< Inventory Module | Financials Module >>

Financials Module

PERMISSION	IF PERMISSION IS *DENIED*
Can View Financial Documents	The user will not be able to view any financial documents (quotes, invoices, POs, received payments, credit memos, etc.) The user will still be able to view other elements, like pull sheets, manifests, crew calls, etc.
Can Edit Financial Documents	The user will not be able to execute the following actions on any financial document: • Add line items (inventory, services, etc.) • Delete line items • Create custom subtotals • Apply trading terms • Edit line item details (type, quantity, notes, time, price, etc.) • Check or uncheck line item mute boxes (WM, PM, TM, LM, NM) • Reset pricing • Edit header information • Add child elements • Add notes • Execute workflow actions • Execute logistic actions • Execute financial options
Can Manage Financial Document Definitions	The user will not be able to view Fee Matrices on the **Financials** menu.
Can View Sensitive Financial Views	The user will not be able to view any document view marked as sensitive.

<< Contact Management Module | Core System >>

Core System

PERMISSION	IF PERMISSION IS *DENIED*
System Administrator	The user will not be able to view the following areas: • System Status (on the **Flex** menu) • Contact Relationship Types (on the **Contacts** menu) • Contact Types (on the **Contacts** menu) • Referral Sources (on the **Contacts** menu) • Accounting Integration (on the **Financials** menu) • Automation Profiles (on the **Financials** menu) • Pricing Model Matrix (on the **Financials** menu) • E-Mail Templates (on the **Projects** menu) • Project Settings (on the **Projects** menu) • Workflow Jobs (on the **Projects** menu) • Backup History (on the **System Settings** menu) • Barcode Printing (on the **System Settings** menu) • Custom Fields (on the **System Settings** menu) • External Authenticators (on the **System Settings** menu) • Integration Bus (on the **System Settings** menu) • Integration Bus Errors (on the **System Settings** menu) • Password Policies (on the **System Settings** menu) • Production Exchange (on the **System Settings** menu) • Rebuild Resource Indexes (on the **System Settings** menu) • Resource Audit Trail (on the **System Settings** menu) • Sales Tax Rules (on the **System Settings** menu) • Security Policies (on the **System Settings** menu) • Service Offerings (on the **System Settings** menu) • Sounds Clips (on the **System Settings** menu) • Sound Themes (on the **System Settings** menu) • Spell Check Engine (on the **System Settings** menu) • Terms & Conditions (on the **System Settings** menu) • Test Quality Agent (on the **System Settings** menu) • Text Templates (on the **System Settings** menu)
Authenticated User	The user will not be able to access any area of Flex.
Guest User	More info soon…

User Administrator	The user will not be able to enter or delete a user ID in the User field of the Terms/Notes tab of a contact record. The user will not be able to view the Users and Security Groups options (on the **System Settings** menu).
Can Change Password	The user will not be able to view the Change Password option on the **Flex** menu.
Can Use Mobile Devices	The user will not be able to log in to Flex Mobile.
Mobile Pin Optional	The user will not be able to use a pin to log into Flex Mobile.

[<< Financials Module]

Best Practices

Overview

The Best Practices Series is a series of videos showing how to best utilize your Flex software. These videos will be less about basic how-to and setup help, but more about the core functionality of Flex and the many different ways that it can be implemented.

Inventory

Virtual Models and Packages

Logistics

Shipping Methods

System Settings

Multiple Corporate Identities